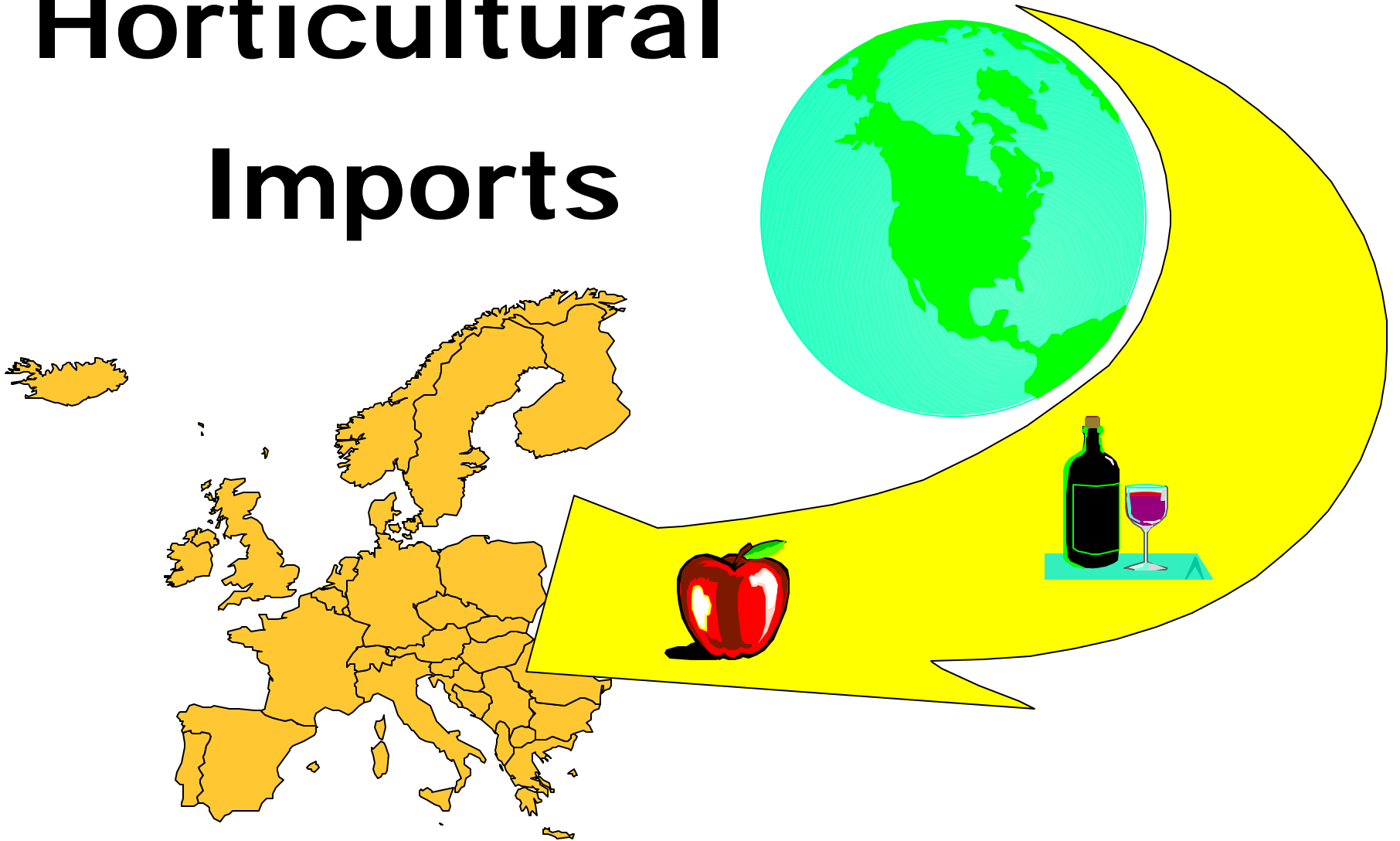


EU Horticultural Imports

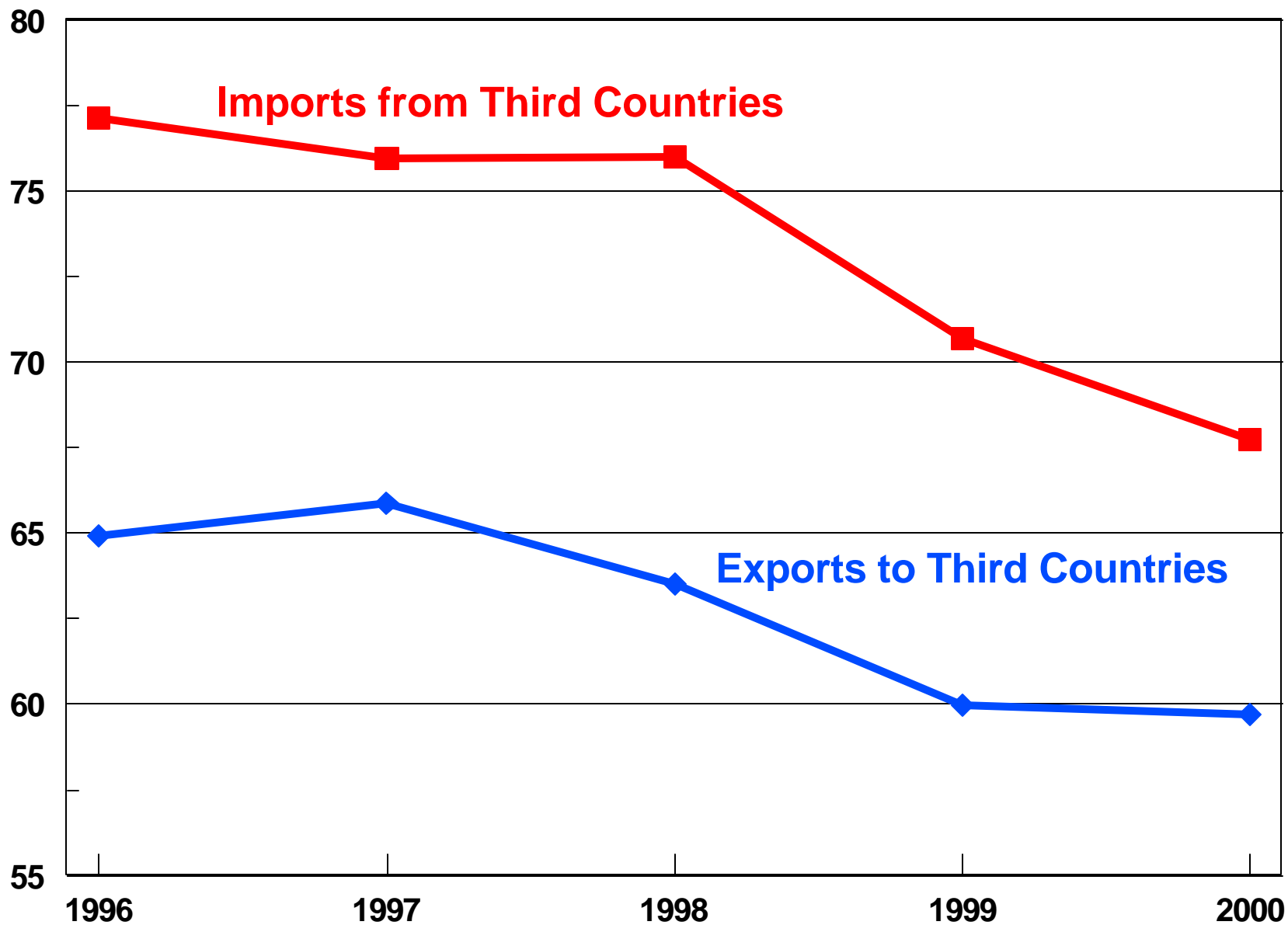


Highlights: EU Imports from Third Countries

- Between 1996 and 2000, the dollar appreciated by 17 percent against the ECU, making EU exports that much more competitive compared to imports.
- On the import side, six product categories accounted for over 90 percent of the decline in value: cassava, bananas, fresh vegetables, soy sauce, water and canned fruits.
- Imports of certain selected items reflected a price inelasticity of demand. Total imports values declined despite lower prices, and in some cases higher imported volumes. Import volumes of U.S. almonds increased and walnuts remained fairly stable despite the appreciation of the dollar, due to lower U.S. domestic prices.
- The total import value of raisins, the principal imported dried fruit, likewise reflected an inelastic demand. Total volumes imported remained fairly constant due to precipitous devaluation of the Turkish Lira against the ECU. U.S. volumes fell off due to strong prices and the appreciating dollar.

EU Total Agricultural Trade With Third Countries

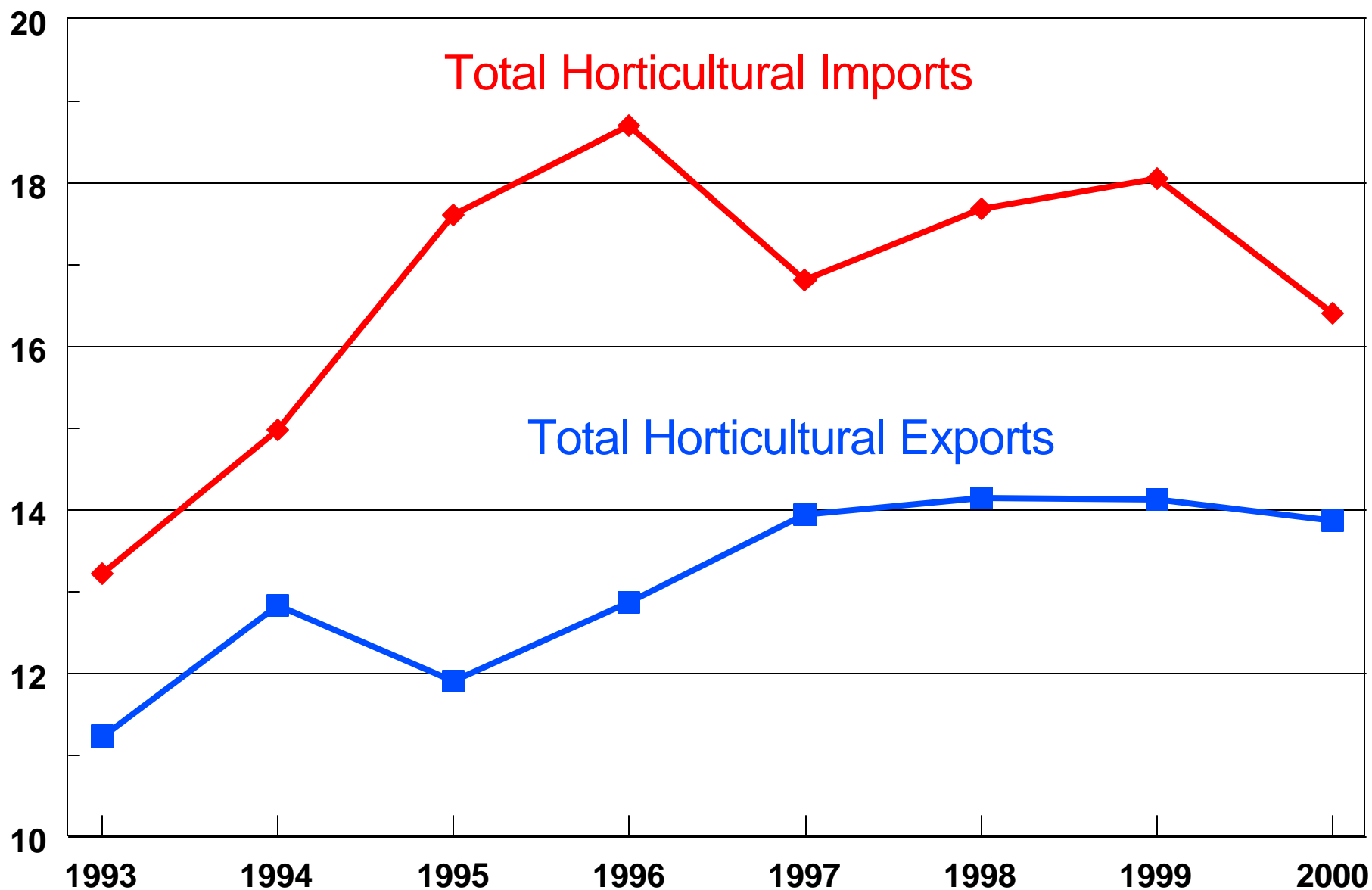
Billion \$



Source World Trade Atlas

The EU Remains a Net Importer from Third Countries of Horticultural Products, but the Gap Narrows

Billion \$

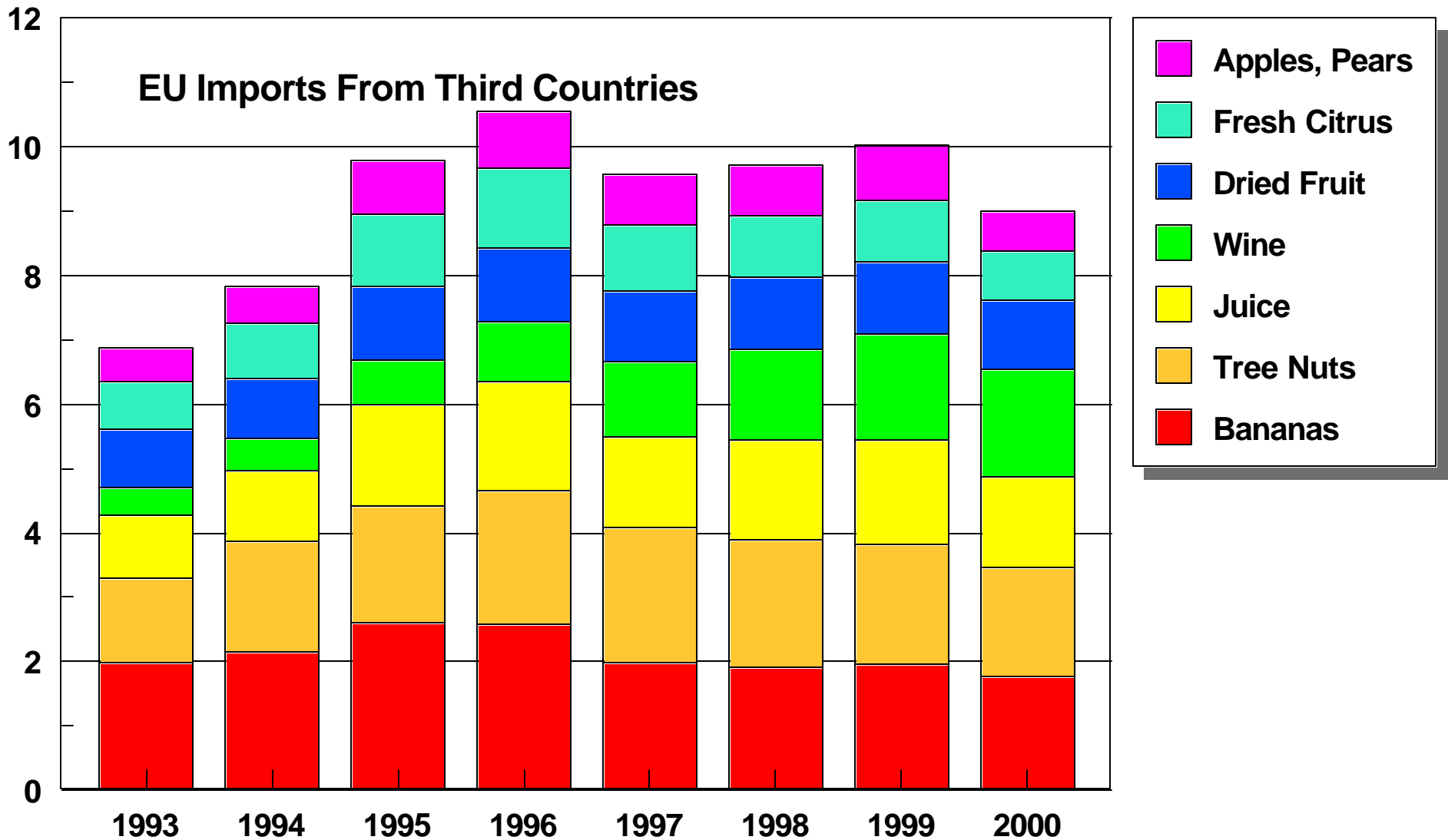


Source: EuroStat and the World Trade Atlas

Tropical Fruits, Nuts and Off Season Produce

Account for over 50 percent of EU's Negative Trade Position

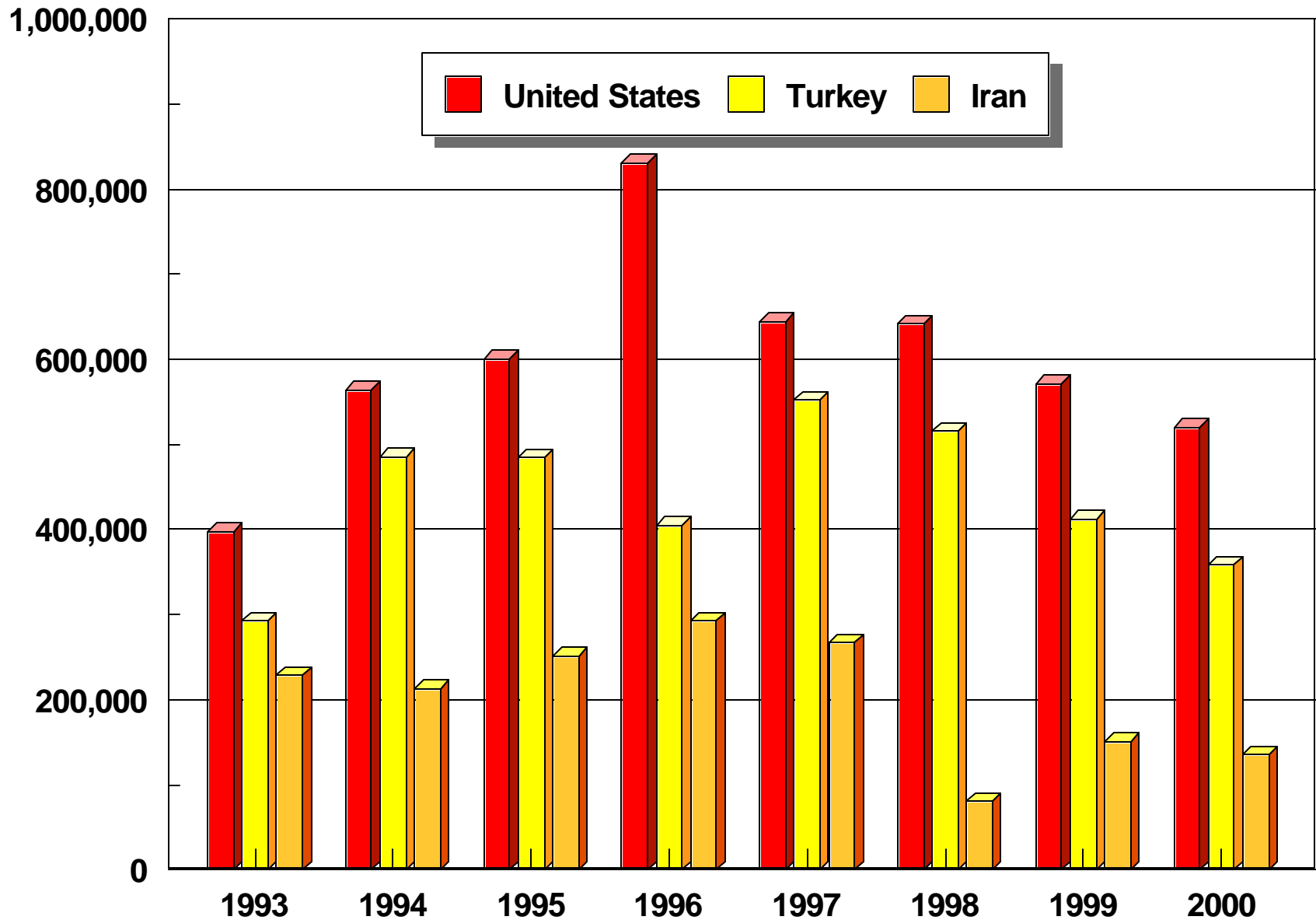
Billion \$



Source: Eurostat and the World Trade Atlas

EU Imports of Selected Tree Nuts: By Value, By Country

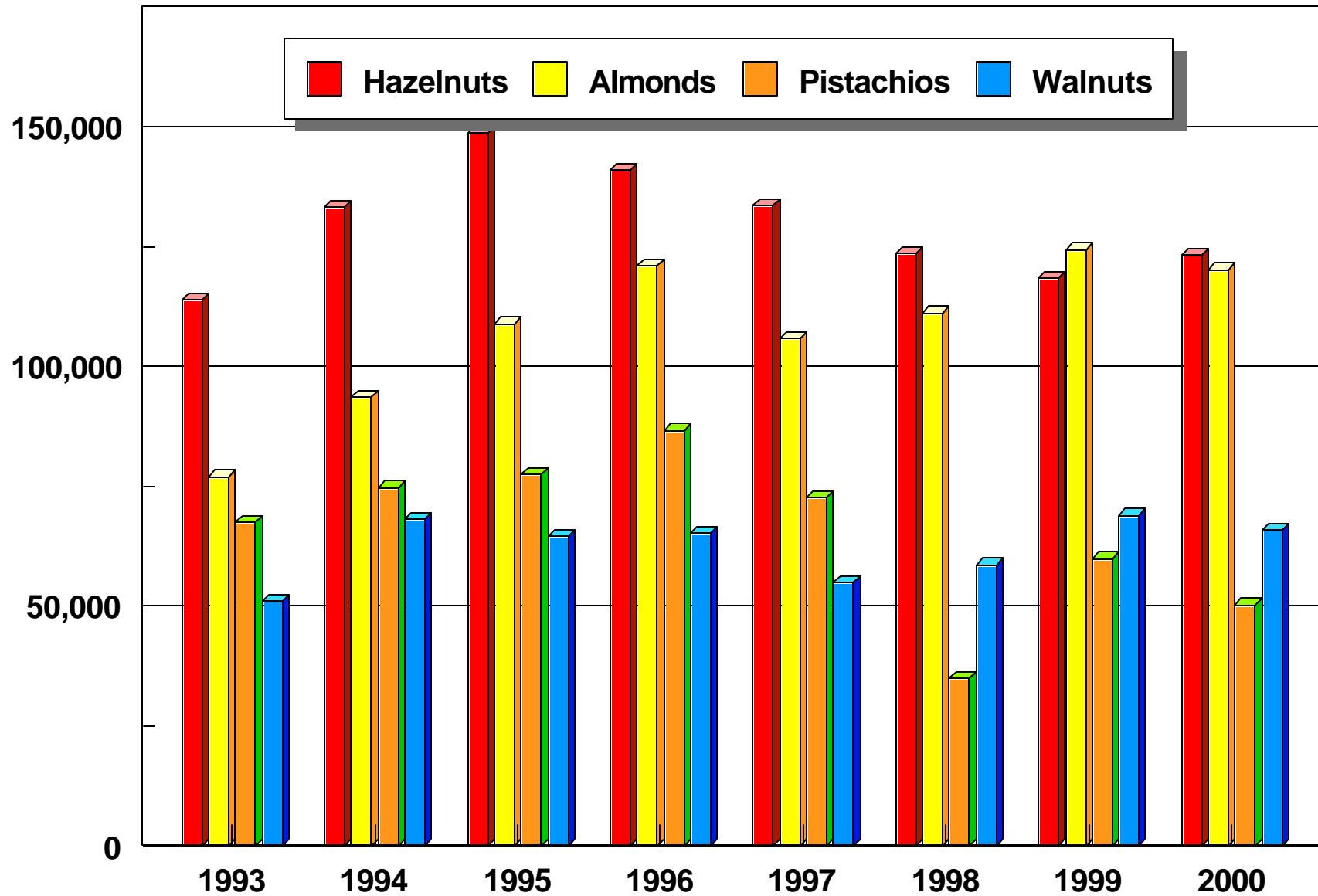
1000 U.S. \$



Source; Eurostat and World Trade Atlas

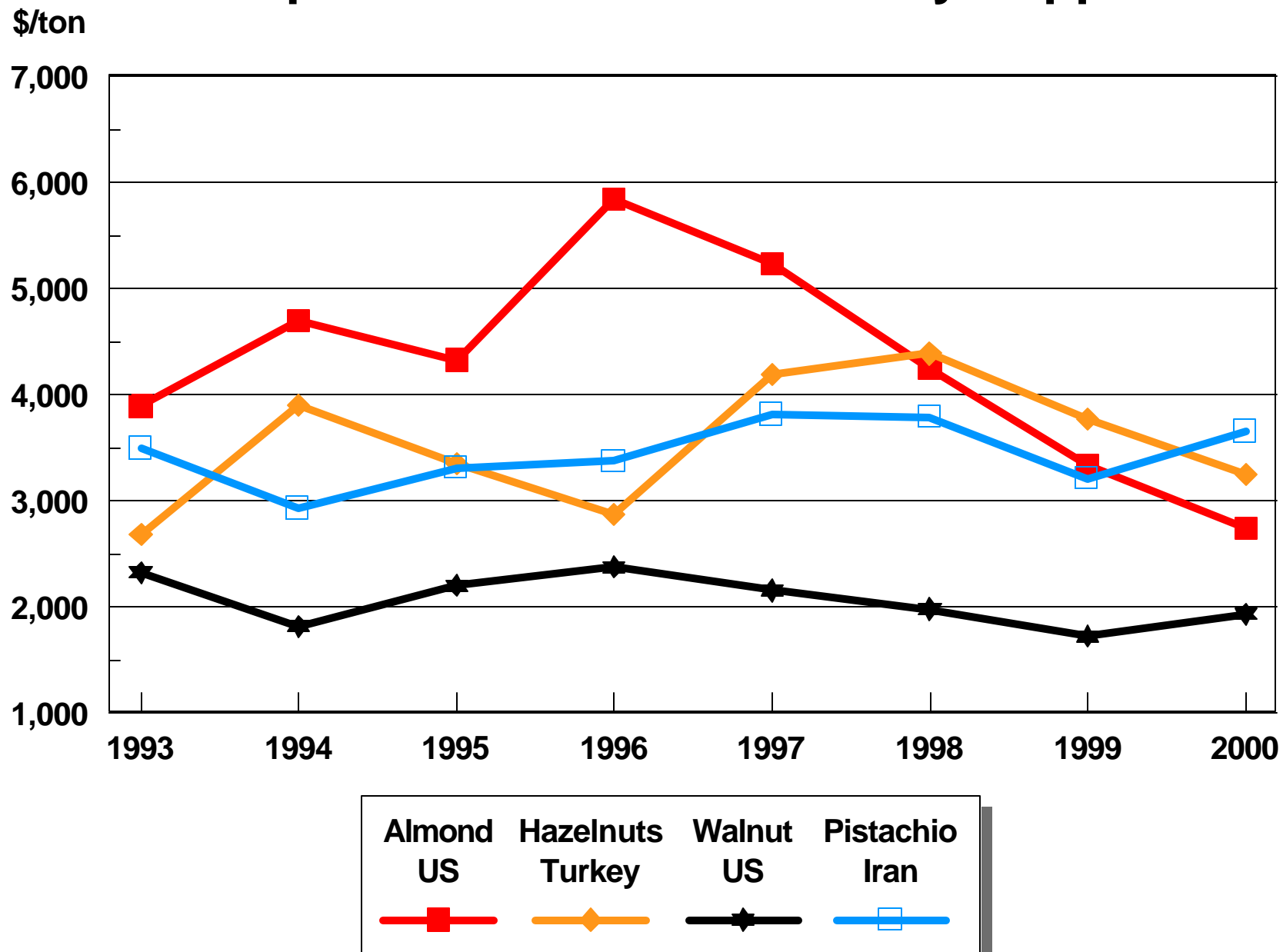
EU Third Country Imports of Leading Tree Nuts

Metric Tons



Source; Eurostat and World Trade Atlas

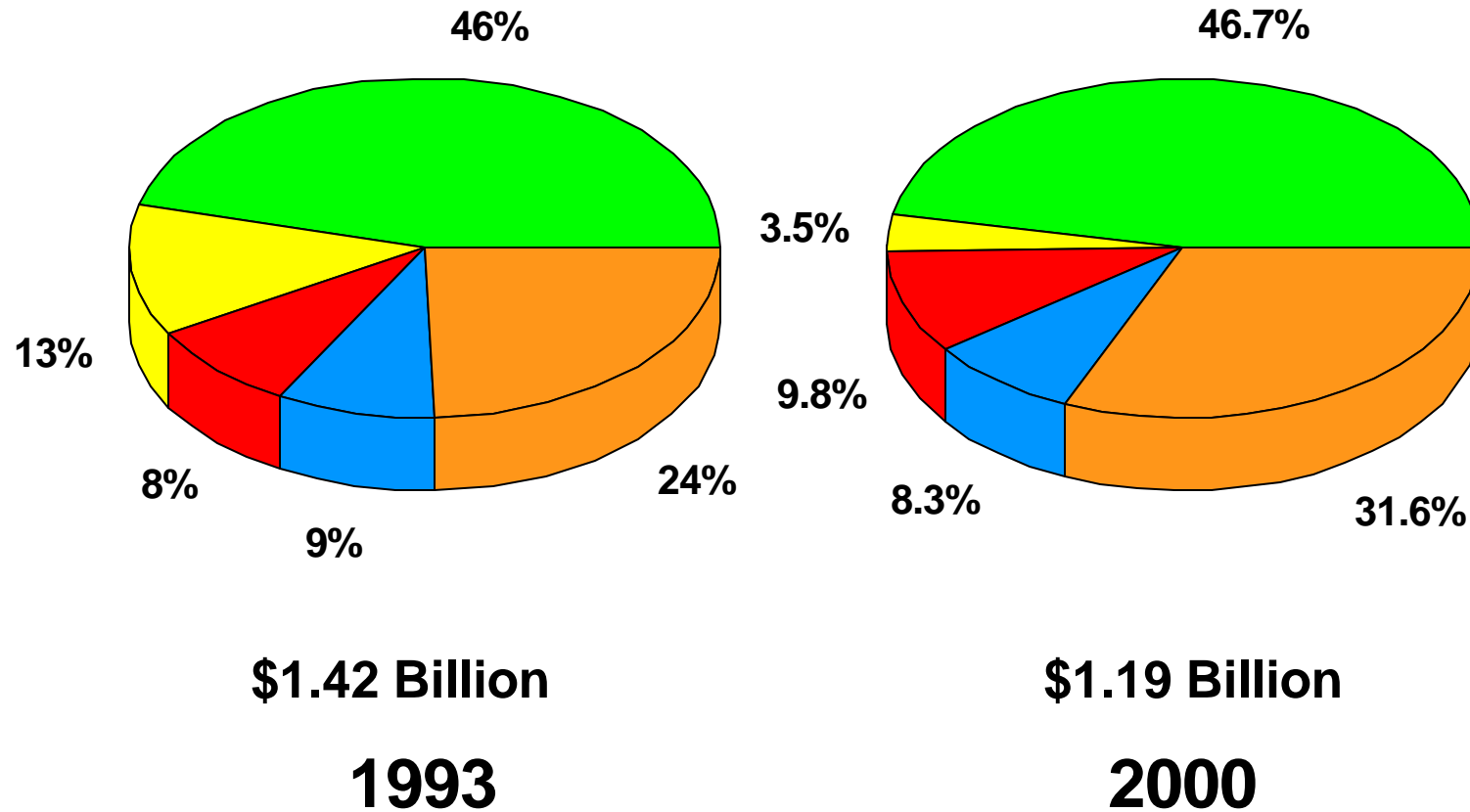
EU Import Unit Values of Primary Suppliers



Source; Eurostat and World Trade Atlas

EU Fruit and Vegetable Juice Imports

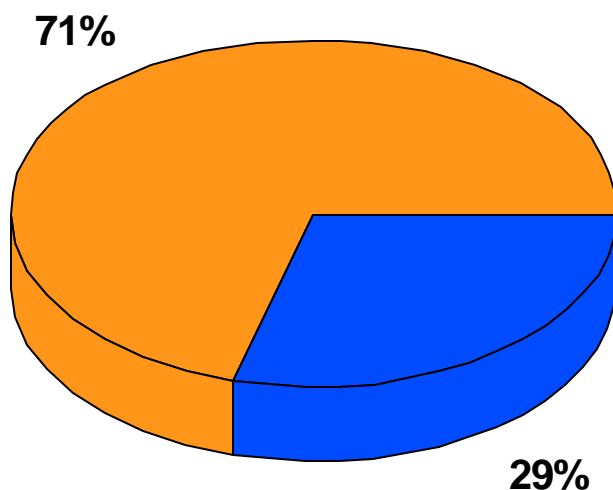
Market Share of Leading Third Country Suppliers



■ Brazil ■ Israel ■ United States ■ Poland ■ Other

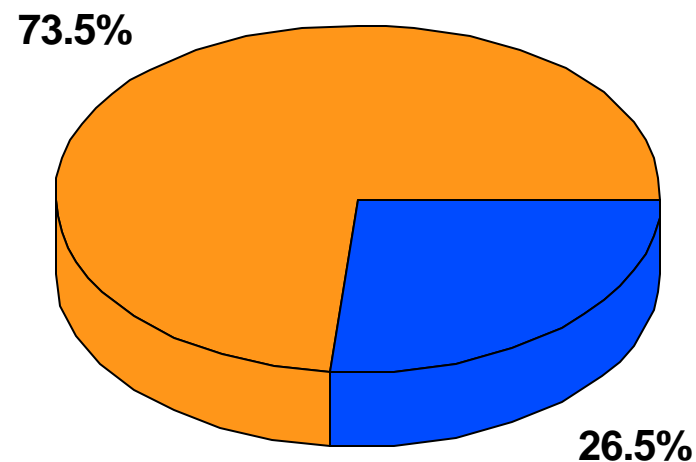
Source; Eurostat and World Trade Atlas

EU Fruit and Vegetable Juice Imports Market Share by Type



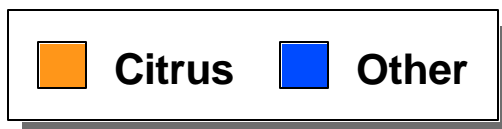
\$1.42 Billion

1993



\$1.19 Billion

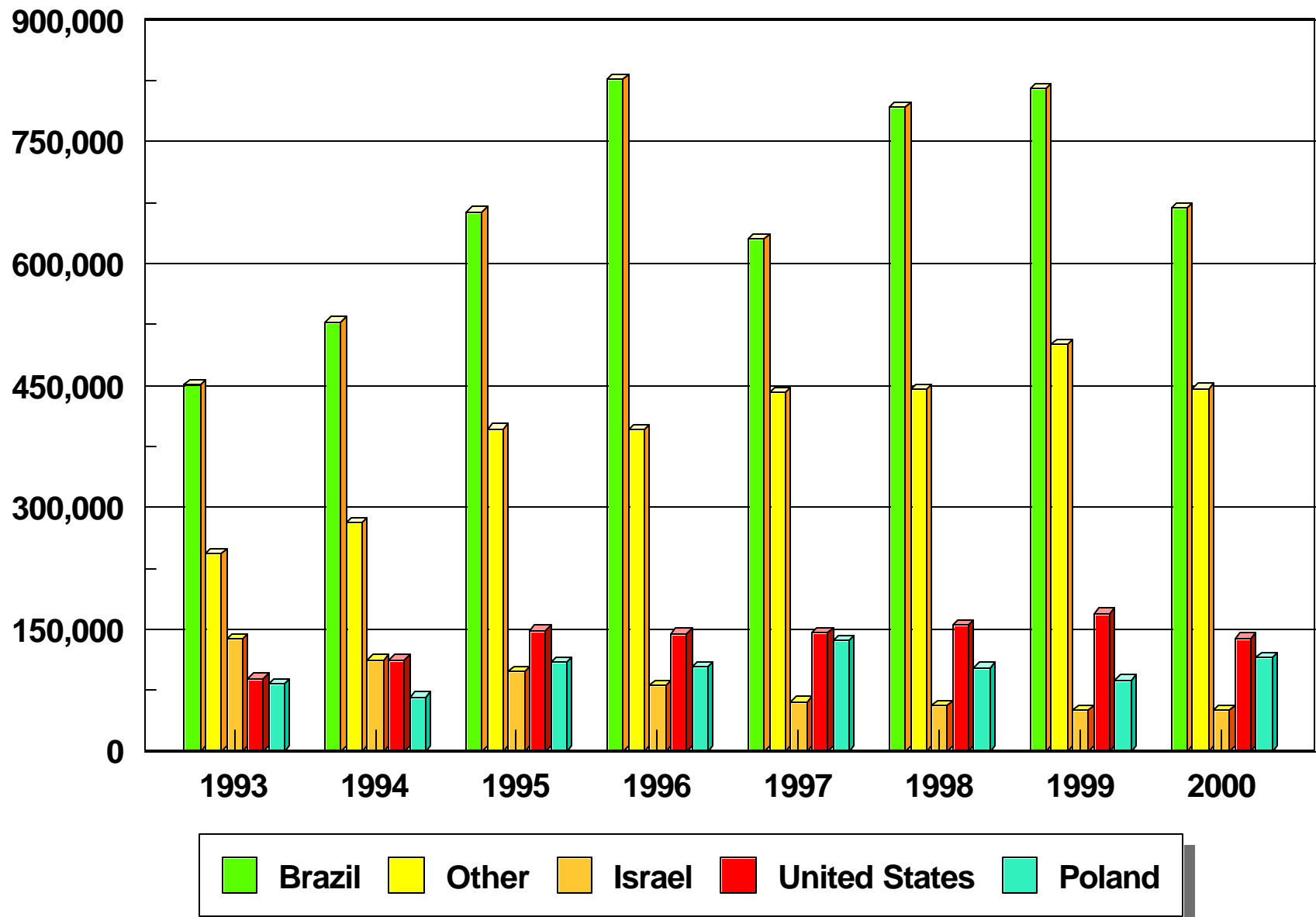
2000



Source; Eurostat and World Trade Atlas

EU Imports of Fruit and Vegetable Juices: By Value, By Country

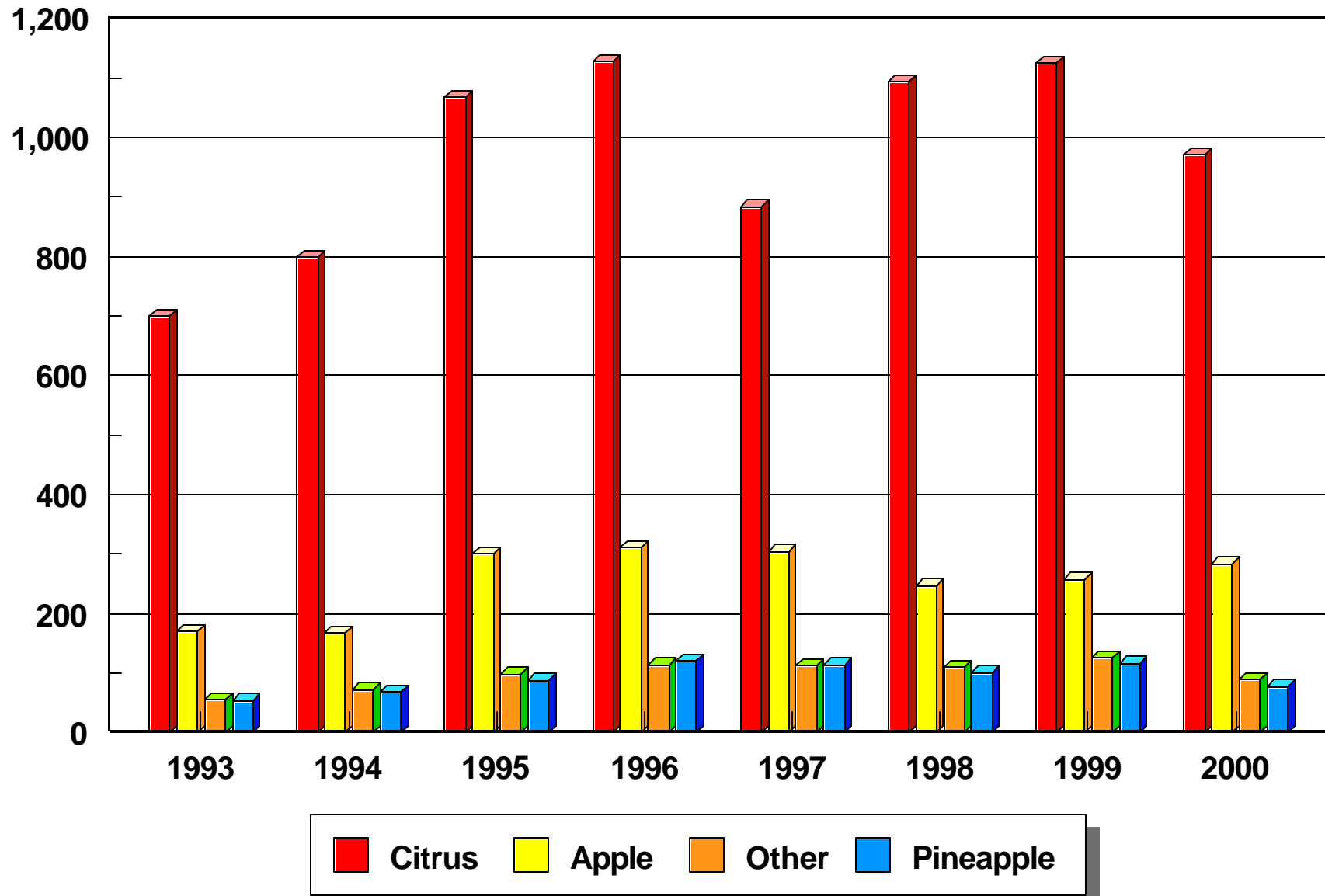
1000 U.S. \$



Source; Eurostat and World Trade Atlas

EU Third Country Imports of Leading Fruit and Vegetable Juices

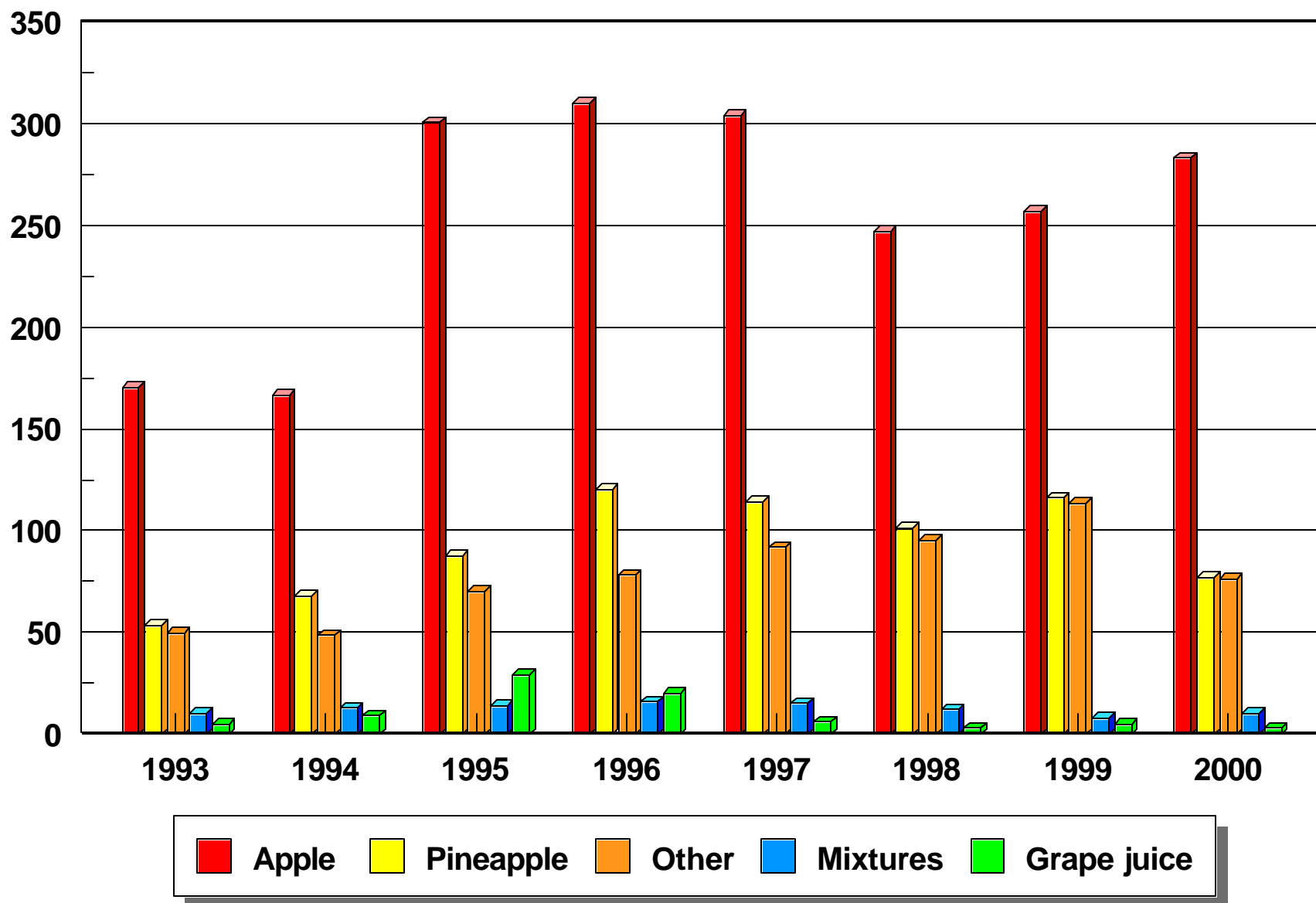
Million U.S. \$



Source; Eurostat and World Trade Atlas

EU Third Country Imports of Non Citrus Fruit and Vegetable Juices

Million U.S. \$

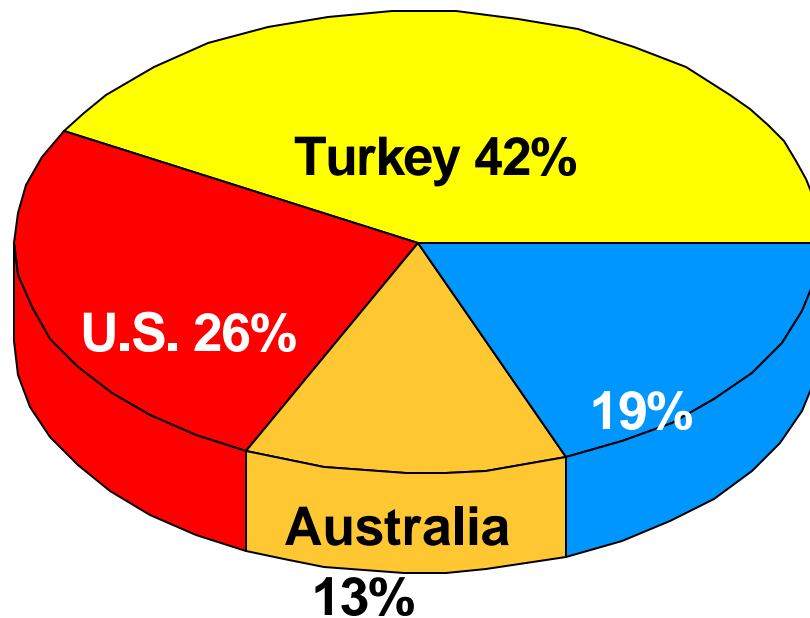


Source; Eurostat and World Trade Atlas

EU Third Country Imports of Raisins

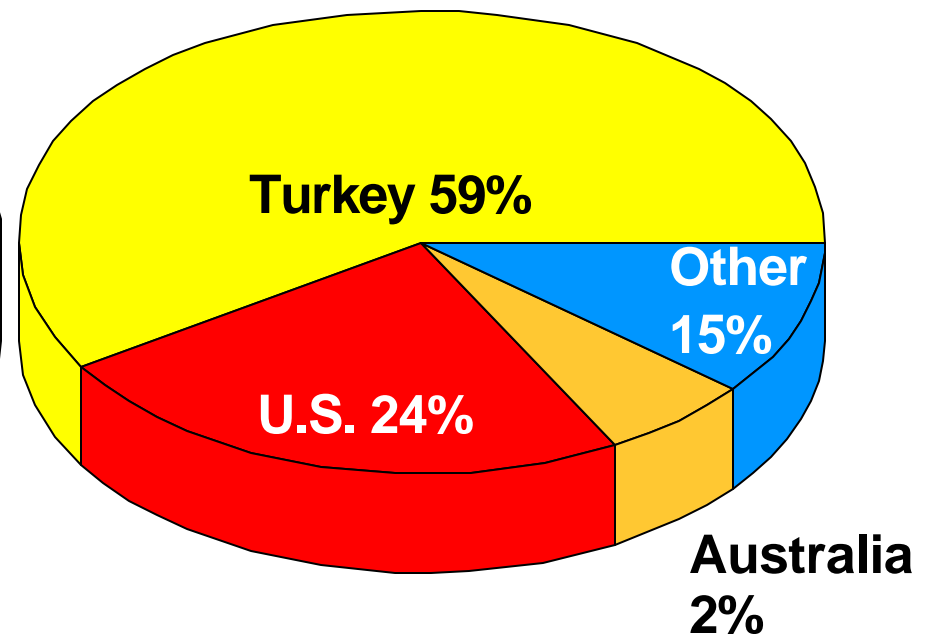
Market Share by Value

\$307 Million



1993

\$283 Million



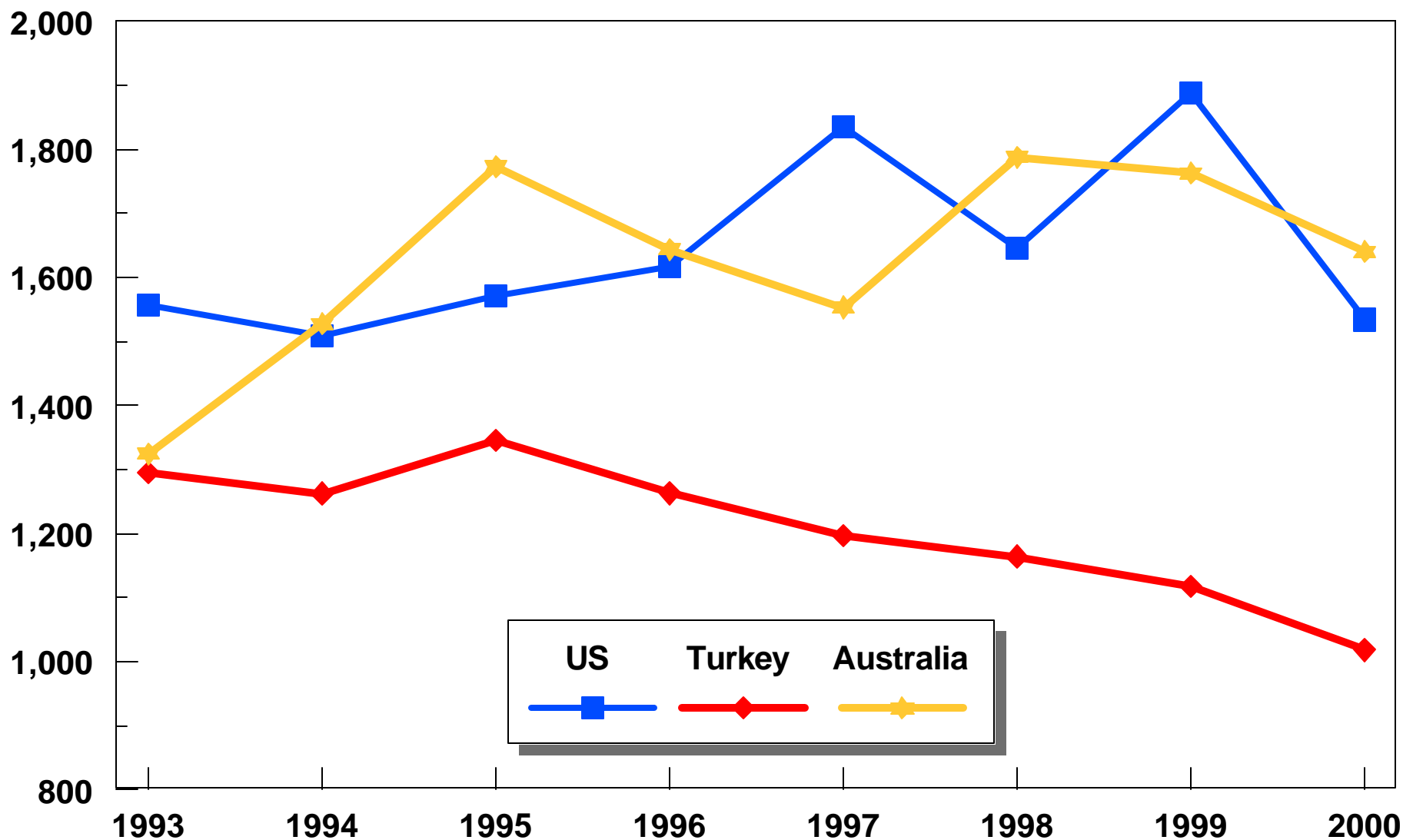
2000

Source; Eurostat and World Trade Atlas

EU Third Country Imports of Raisins

Import Unit Values

U.S. \$/Ton

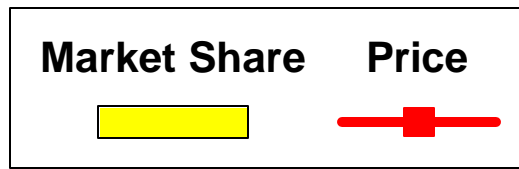
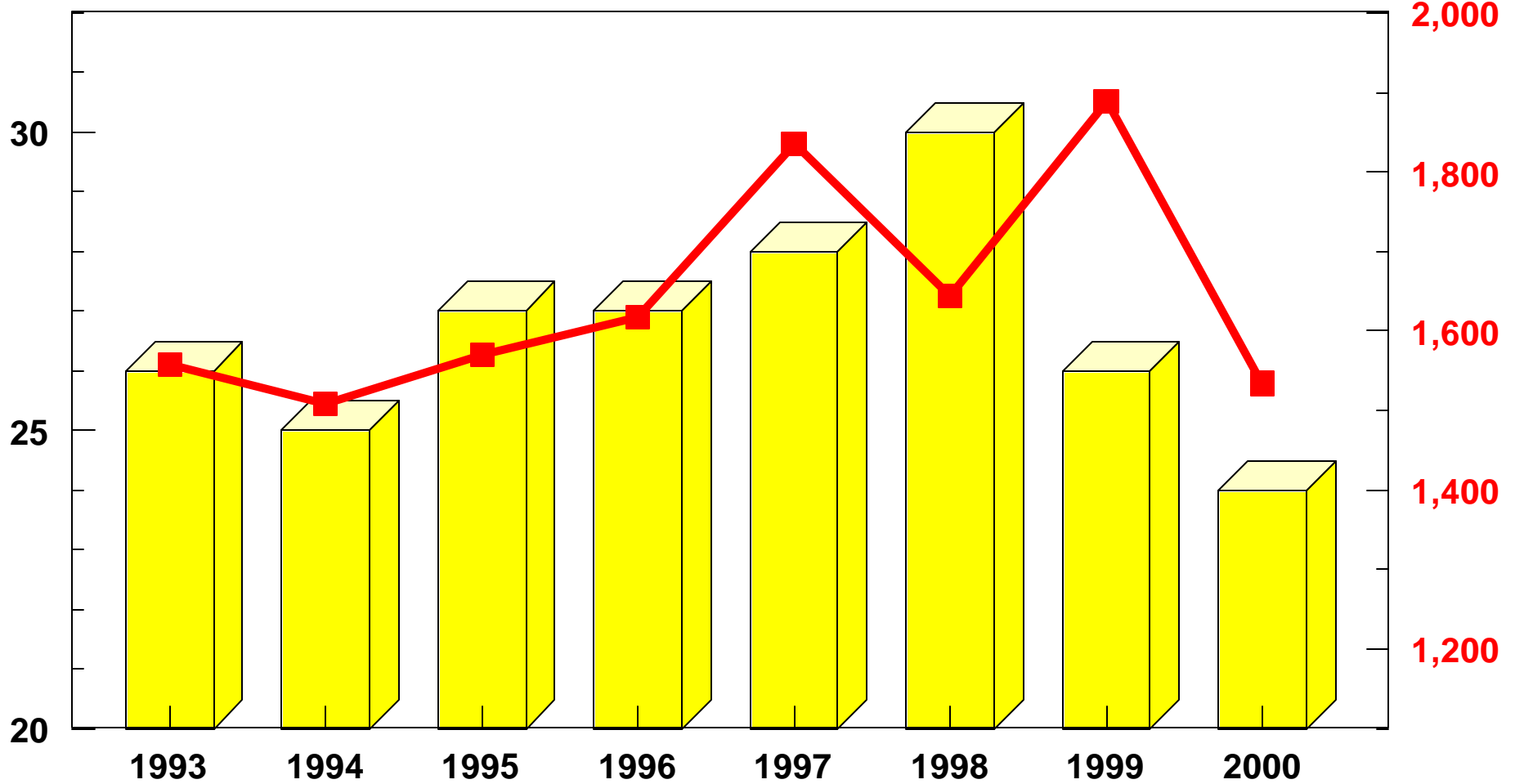


Source; Eurostat and World Trade Atlas

EU Raisin Imports from the United States

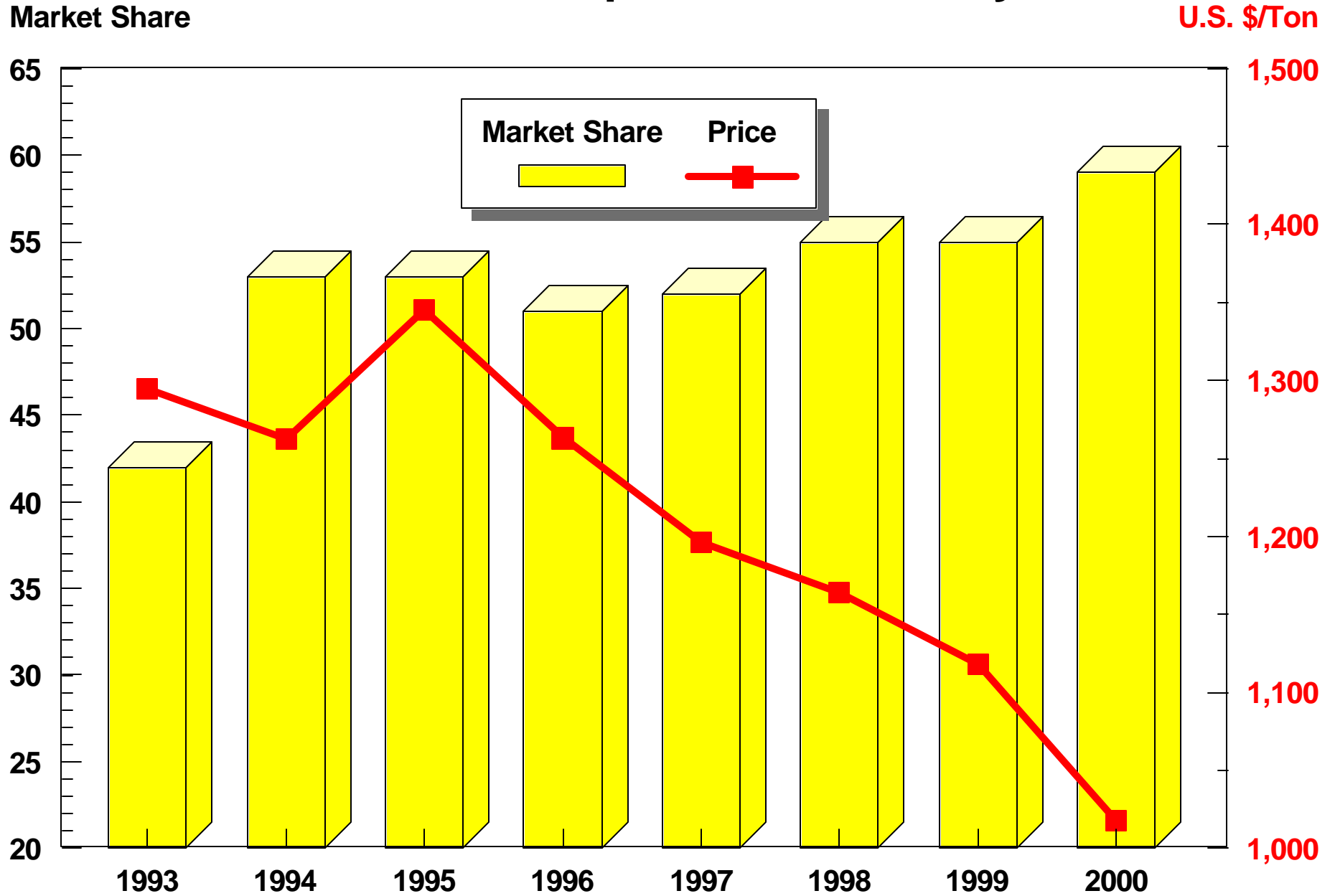
Market Share

U.S. \$/Ton



Source; Eurostat and World Trade Atlas

EU Raisin Imports from Turkey



Source; Eurostat and World Trade Atlas

EU Wine Imports by Tariff Classification

Million of Hectoliters

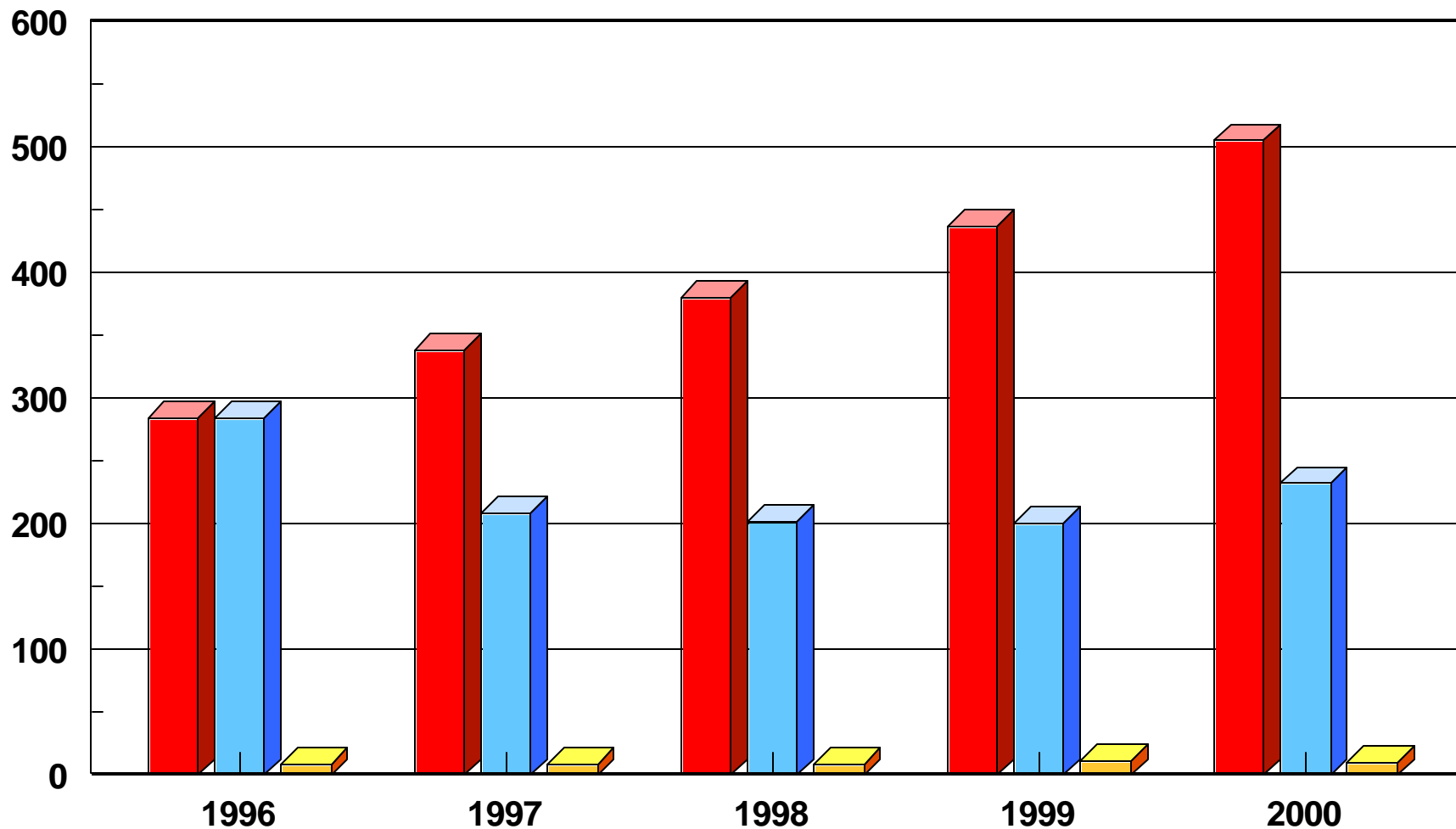
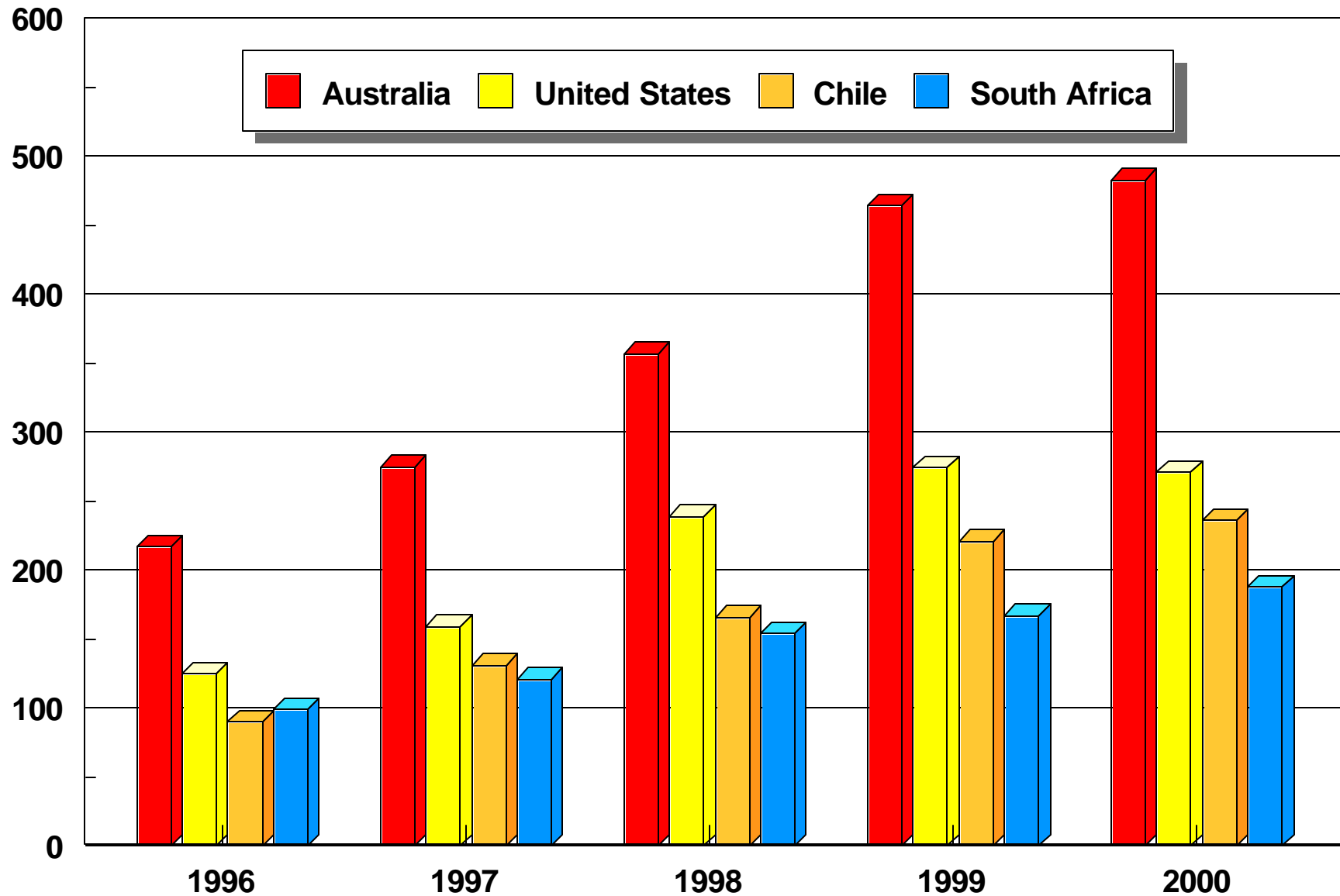


Table and Fortified Wine In Bottles 2 Liters or less **Table and Fortified Wine In Bottles of more than 2 Liters** **Sparkling Wine**

Source; Eurostat and World Trade Atlas

EU Wine Imports by Country

Million U.S. \$

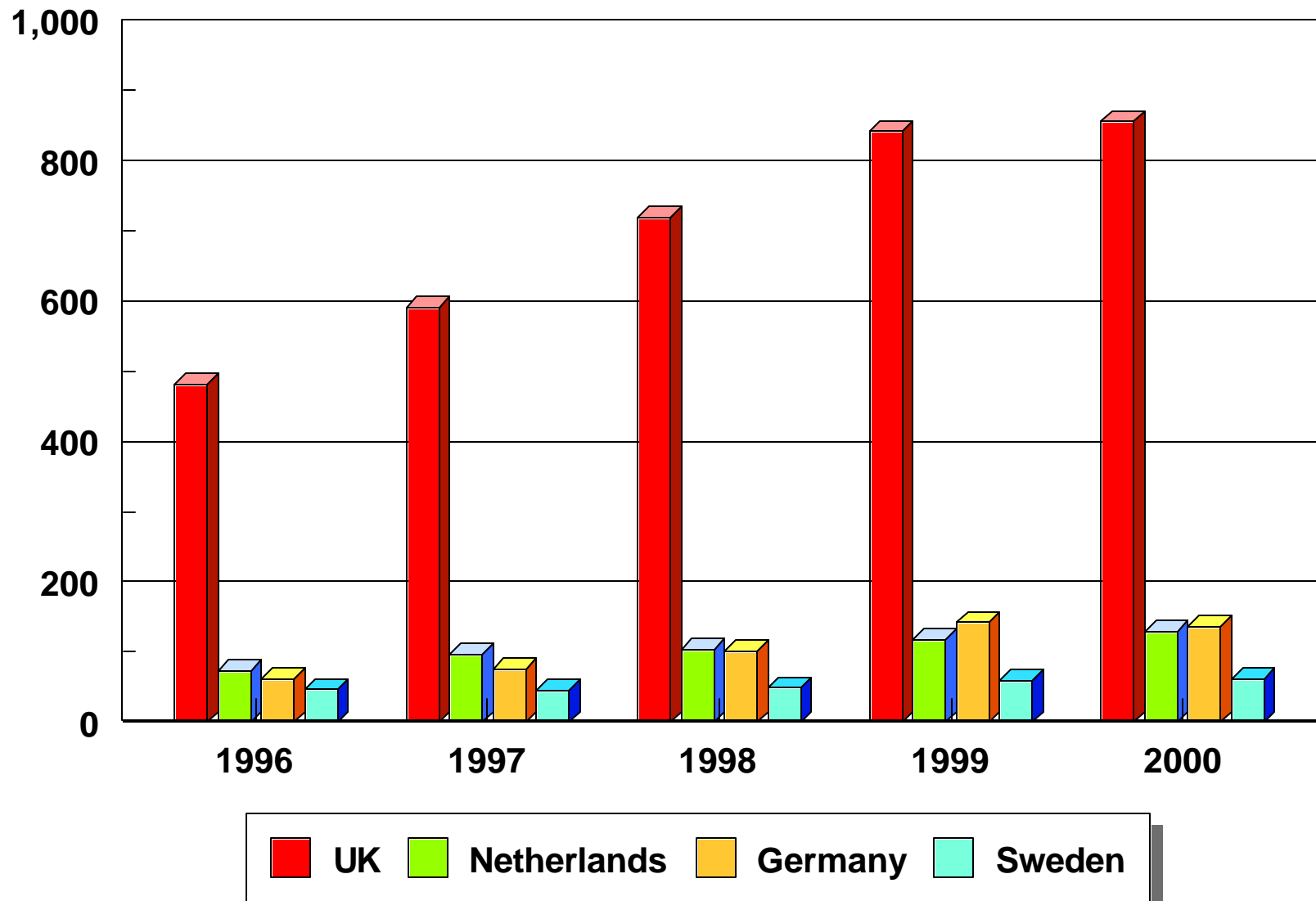


Source : World Trade Atlas

Imports of Wine by Principal EU Countries

Table and Fortified Wine in containers 2 liters or Less

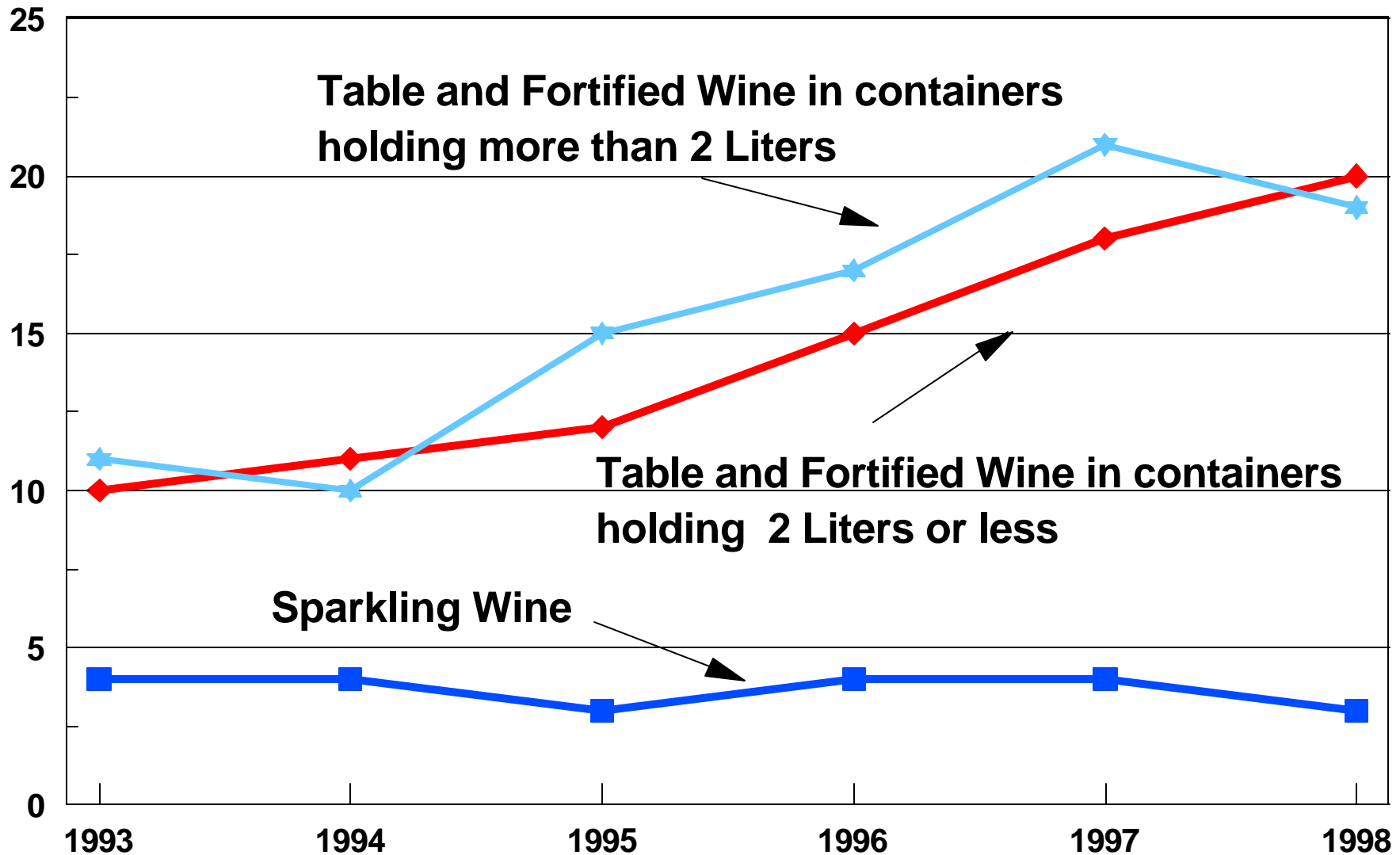
Millions U.S. \$



Source: World Trade Atlas

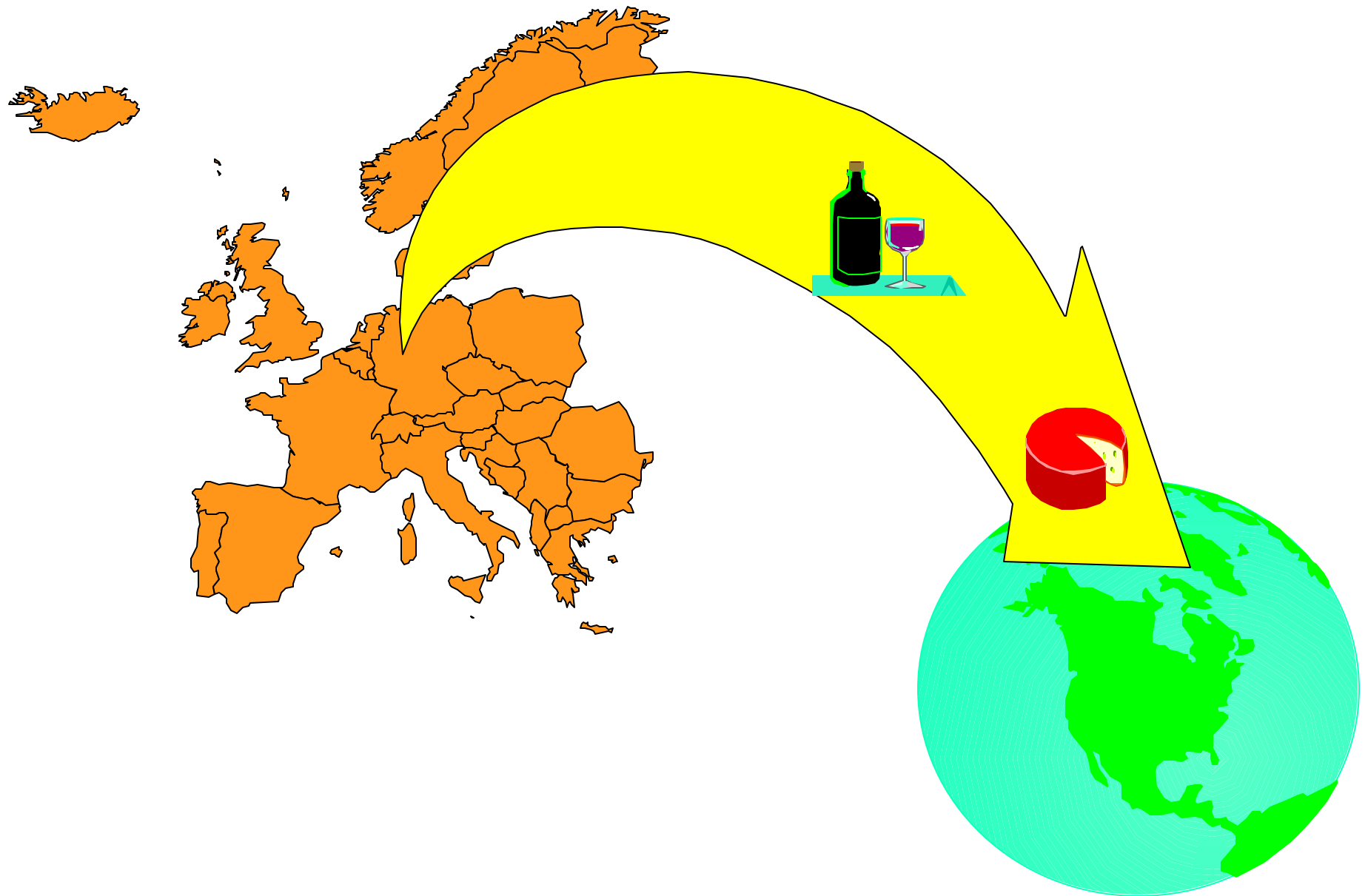
EU Wine Imports: Third Country Market Share Imports By Tariff Classification

Percent



Source; Eurostat and World Trade Atlas

EU Horticultural Exports

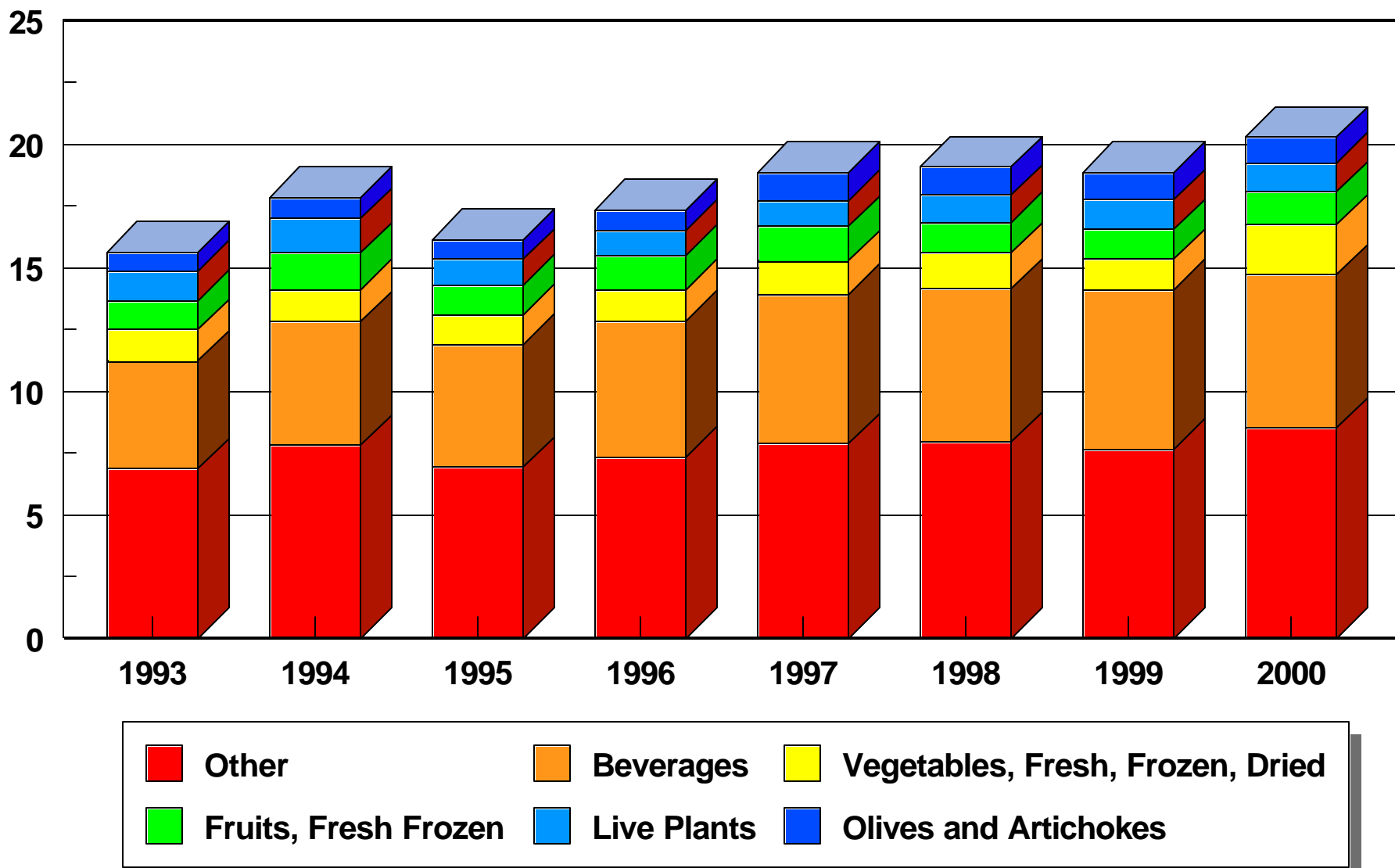


Highlights: EU Exports to Third Countries

- Between 1996 and 2000, the dollar appreciated by 17 percent against the ECU, making EU exports that much more competitive compared to imports.
- On the export side three categories accounted for over one third of the net gain in value: beverages, consisting of wine, beer and water; canned vegetables, consisting primarily of tomatoes, artichokes and olives; and enzymes.
- EU exports of beverages drove the total growth figure. Between 1993 and 2000 the value of total exports grew by nearly 24 percent while the growth in the value of wine exceed 50 percent. Wine is a substantial component of EU horticultural exports, accounting for 23 percent of overall exports in 1993 and nearly 28 percent in 2000. Beer grew by 31 percent during the 1993-2000 period, accounting for 9.9 percent of horticultural exports in 1993 and 10.4 percent in 2000.
- Since 1993, the value of the EU's fresh citrus exports declined by 3 percent. Export volumes, however, increased by 23 percent, due to an 84-percent increase in shipments of mandarins (clementines). The average export price dropped by 21 percent during this period. Orange shipments were down to Russia, Poland, Switzerland and Czechoslovakia but to some extent were replaced by mandarins. Mandarin exports to Poland increased from 69,000 tons to 137,000 tons and to the United States increased from 23,000 to 79,000 tons.

Top Five Horticultural Categories Account for 60 Percent of EU Exports To Third Countries

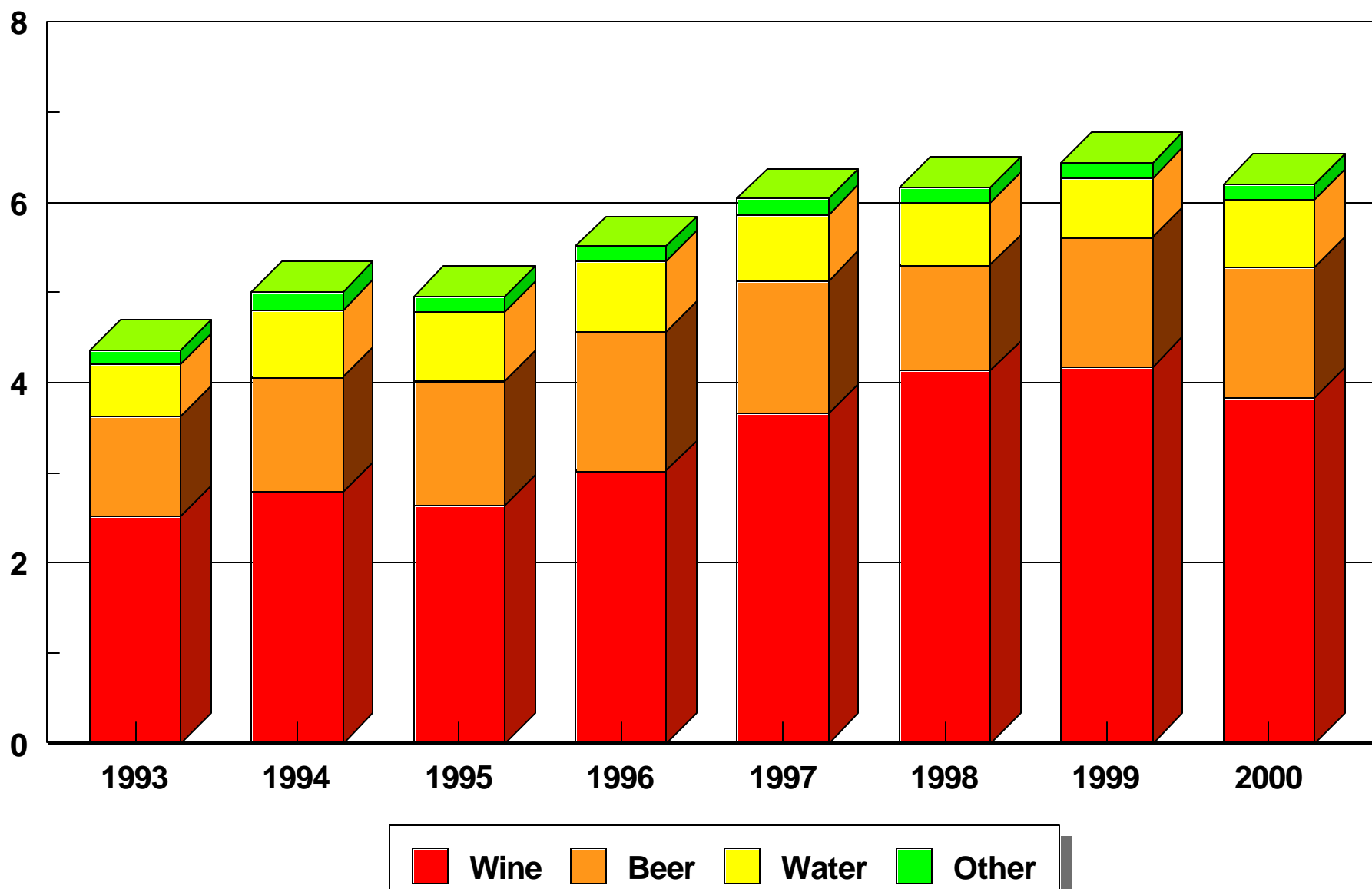
Billion \$



Source: Eurostat and the World Trade Atlas

Wine is the Primary Export Item included in the Beverage Category

Billion \$

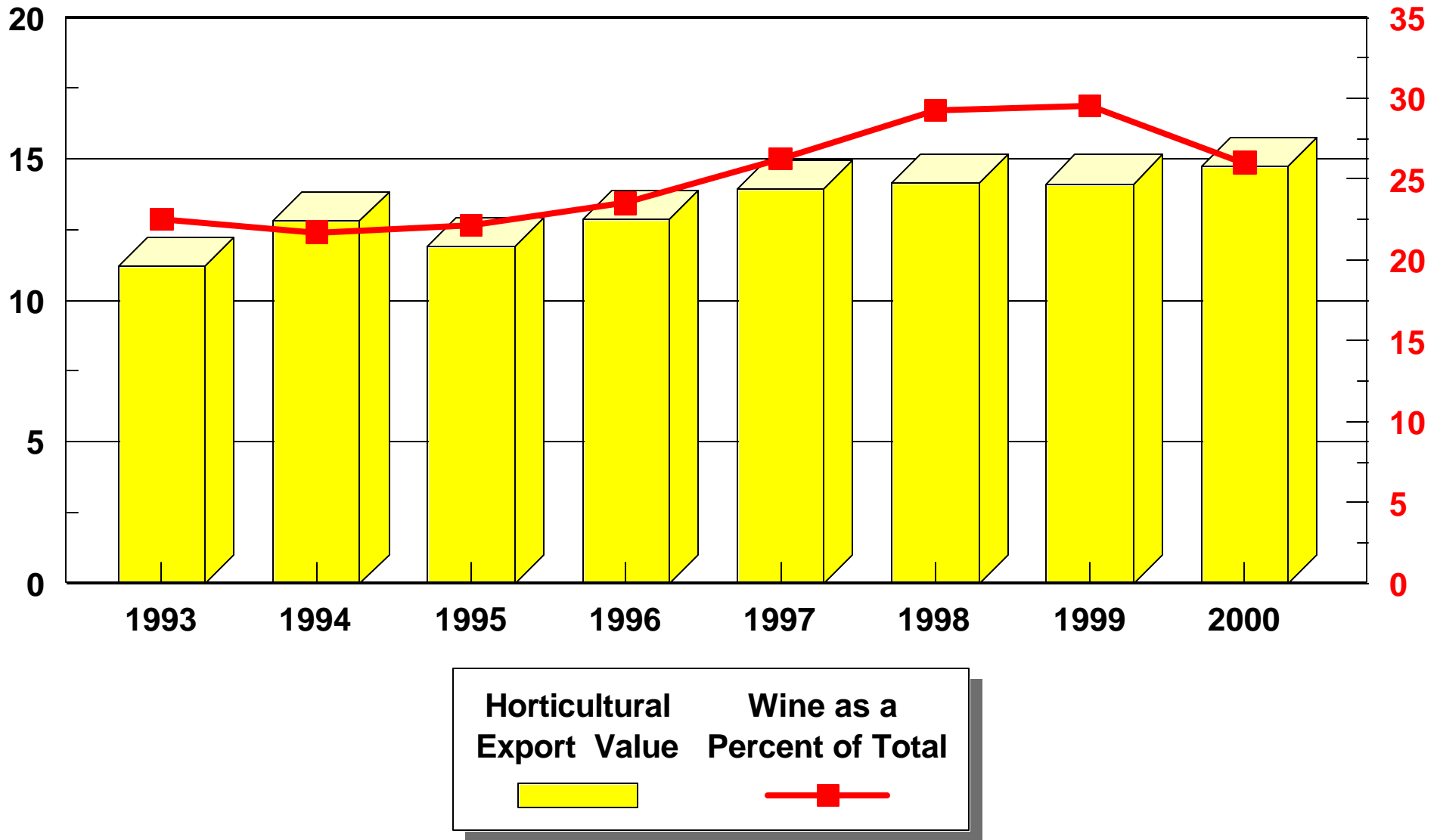


Source: EuroStat and the World Trade Atlas

Wine is the Largest Single EU Export Item and Accounts for about 25 percent of Total Horticultural Export Value

Billion \$

Wine Percentage

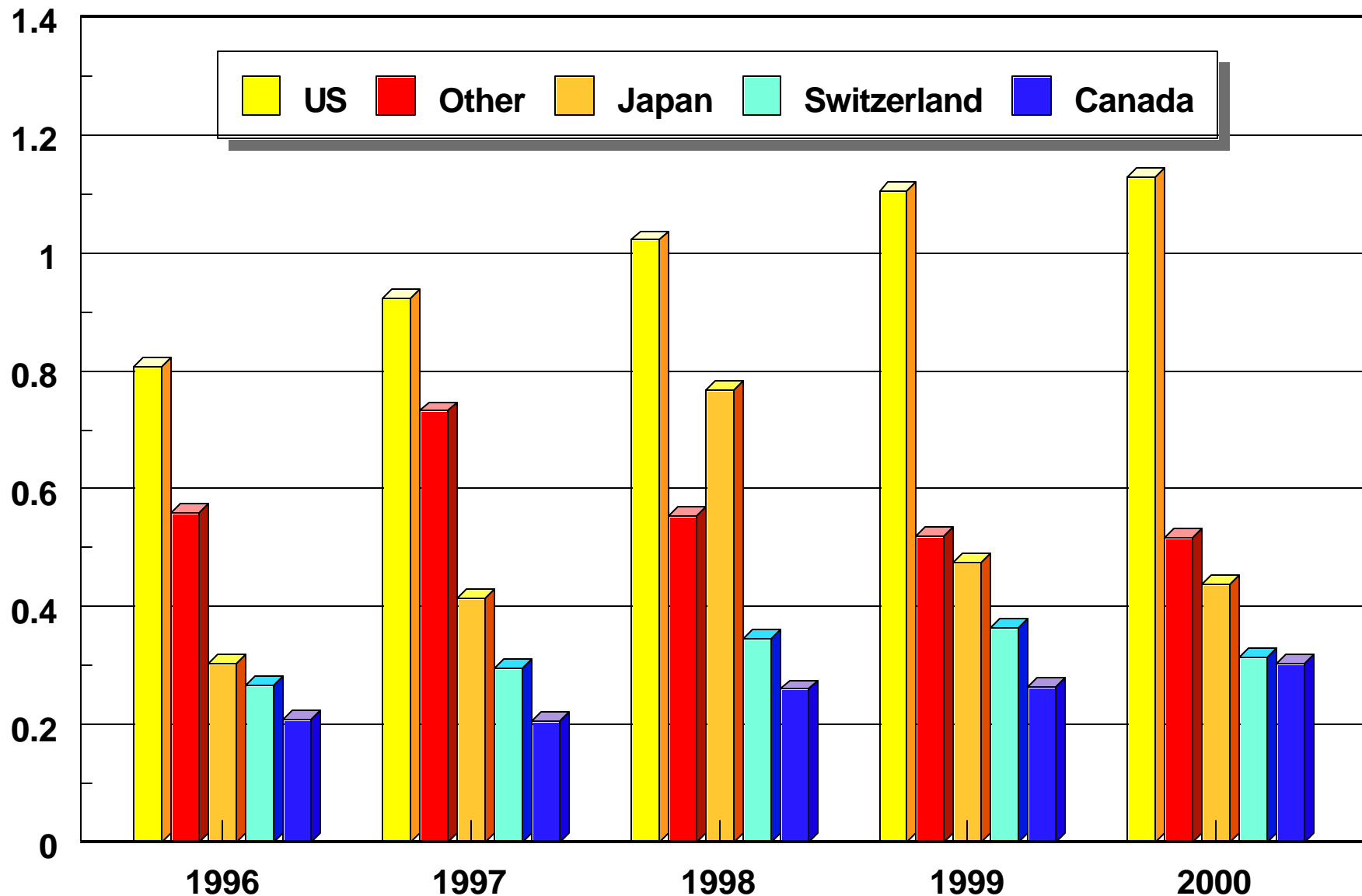


Source: EuroStat and the World Trade Atlas

EU Wine Exports to Principal Third Country Markets

Table and Fortified Wine in containers holding 2 Liters or less

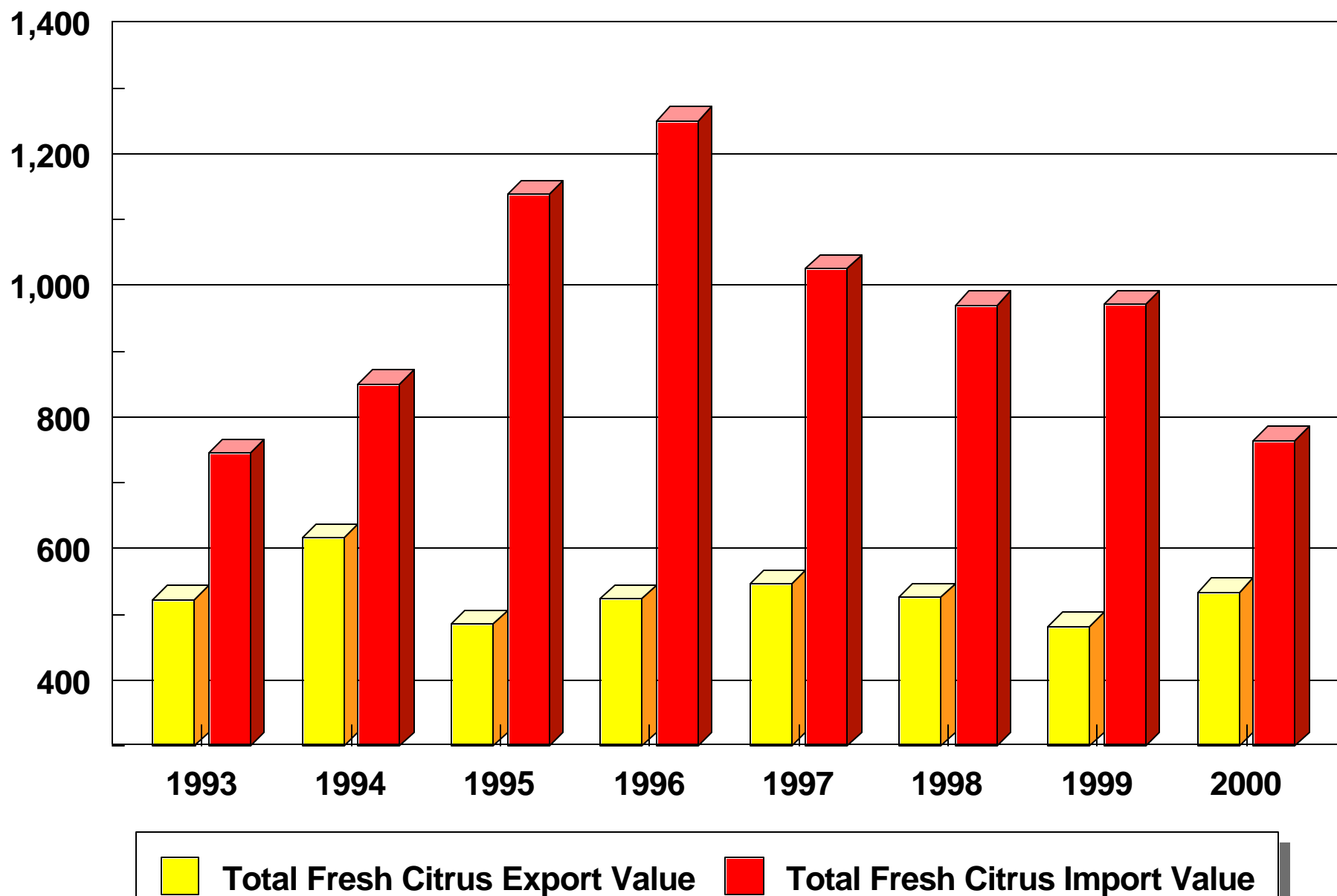
Billions U.S. \$



Source: World Trade Atlas

EU Fresh Citrus Trade with Third Countries

Million U.S. \$

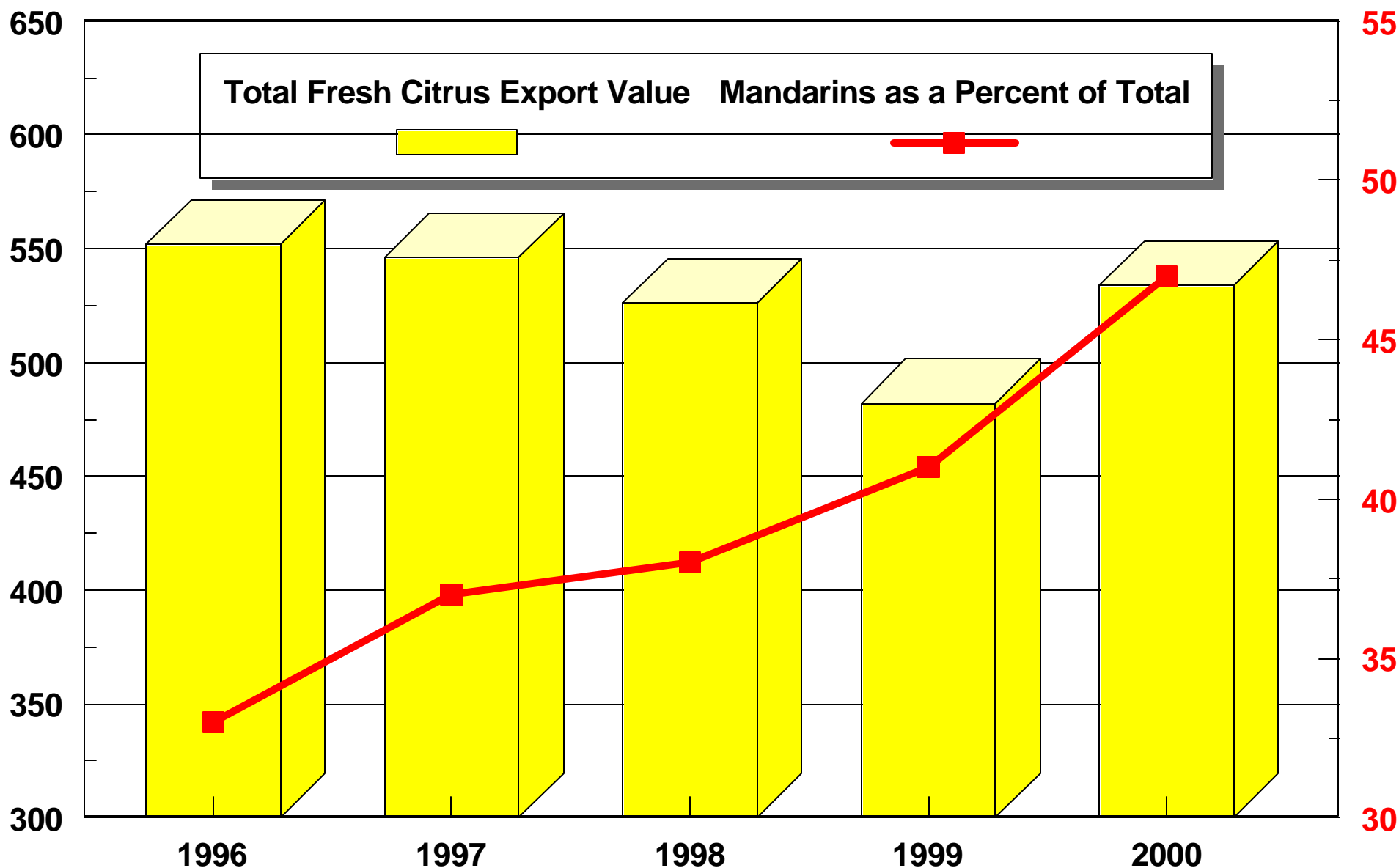


Source: EuroStat and the World Trade Atlas

EU Fresh Citrus Exports to Third Countries and Mandarins as a Percent of Total Fresh Citrus Exports

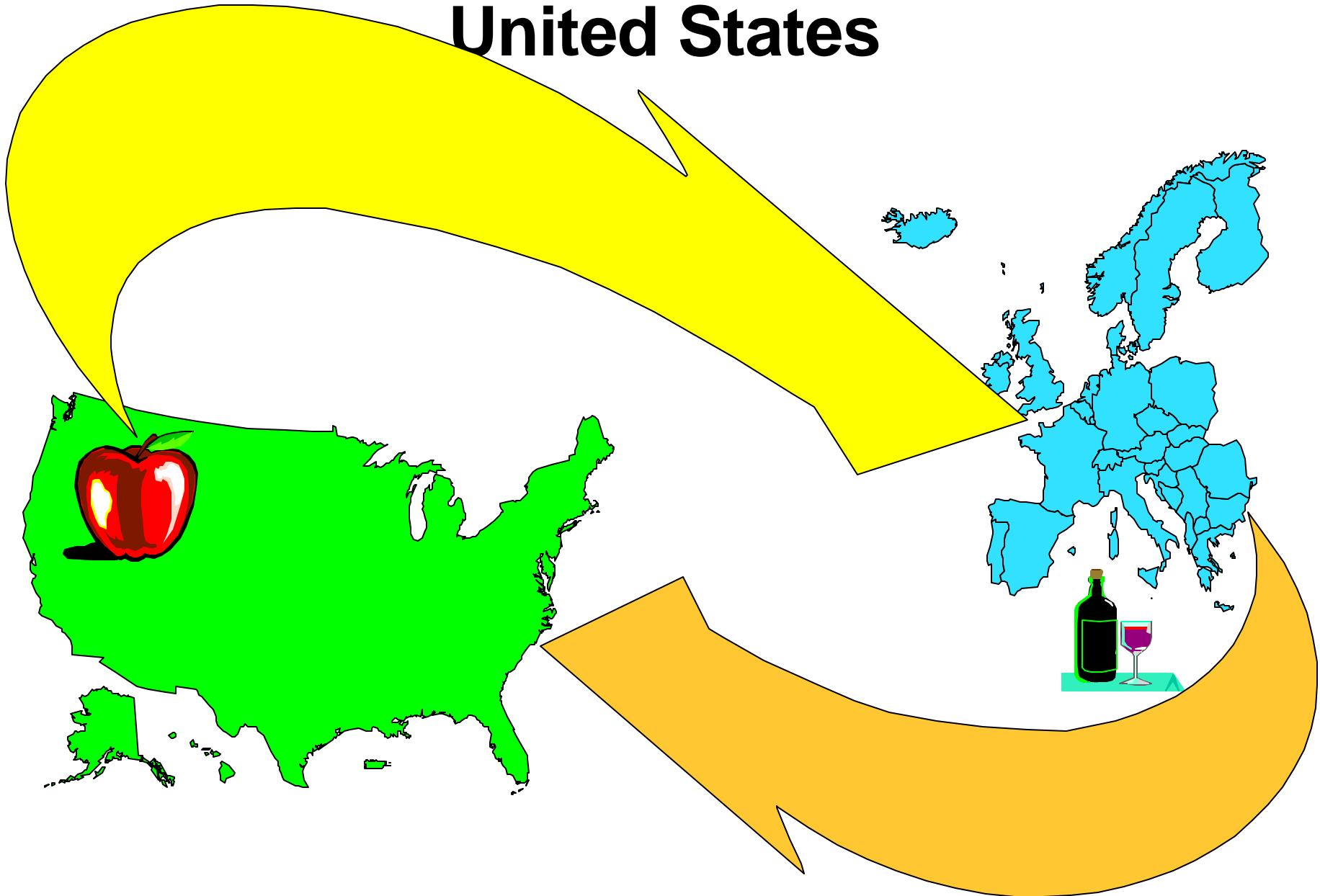
Million U.S. \$

Percent



Source: Eurostat and the World Trade Atlas

EU Horticultural Trade With the United States

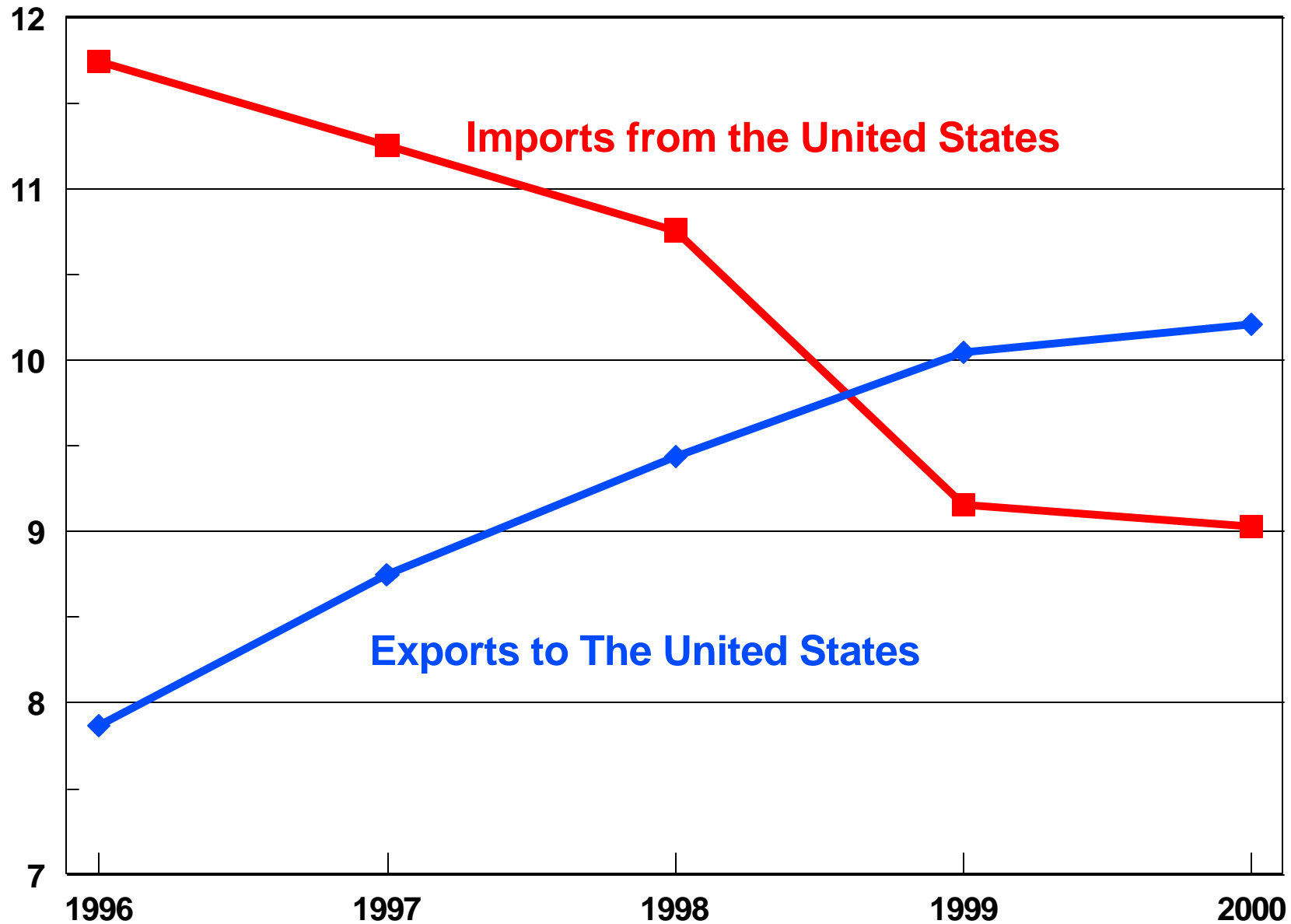


Highlights: EU Trade with the United States

- In 1999, the EU became a net exporter of agricultural products to the United States for the first time. Several factors were responsible for this development: The appreciation of the dollar against the ECU helped make U.S. exports more expensive, while making EU commodities more competitive. U.S. bulk commodity shipments to the EU declined due to bio-tech restrictions.
- Within the horticultural sector, the EU has run a net surplus for some time, due to beverage exports, which account for two thirds of the EU's shipments to the United States.
- EU horticultural imports from the United States leveled off in 1996, due to a drop in the exports of tree nuts and citrus fruit. Several factors account for this change. Remarkably, the ECU actually appreciated against the dollar, and U.S. commodity prices were a good bit higher than today. EU imports of U.S. almonds more than doubled in value between 1993 and 1996, and by 1996 accounted for 36 percent of total imports from the United States. However, by 2000 the import value fell 36 percent from the 1996 high, and accounted for 27 percent of total imports from the U.S. EU imports of citrus fruit, which were strong between 1993 and 1996, declined by a third since 1996.
- One key strong area has been EU imports of U.S. wine, where the UK is the leading market. EU imports of U.S. wine have steadily increased. Between 1993 and 2000, wine's share of total imports grew from only 4 percent to 16 percent.

EU Total Agricultural Trade with the United States

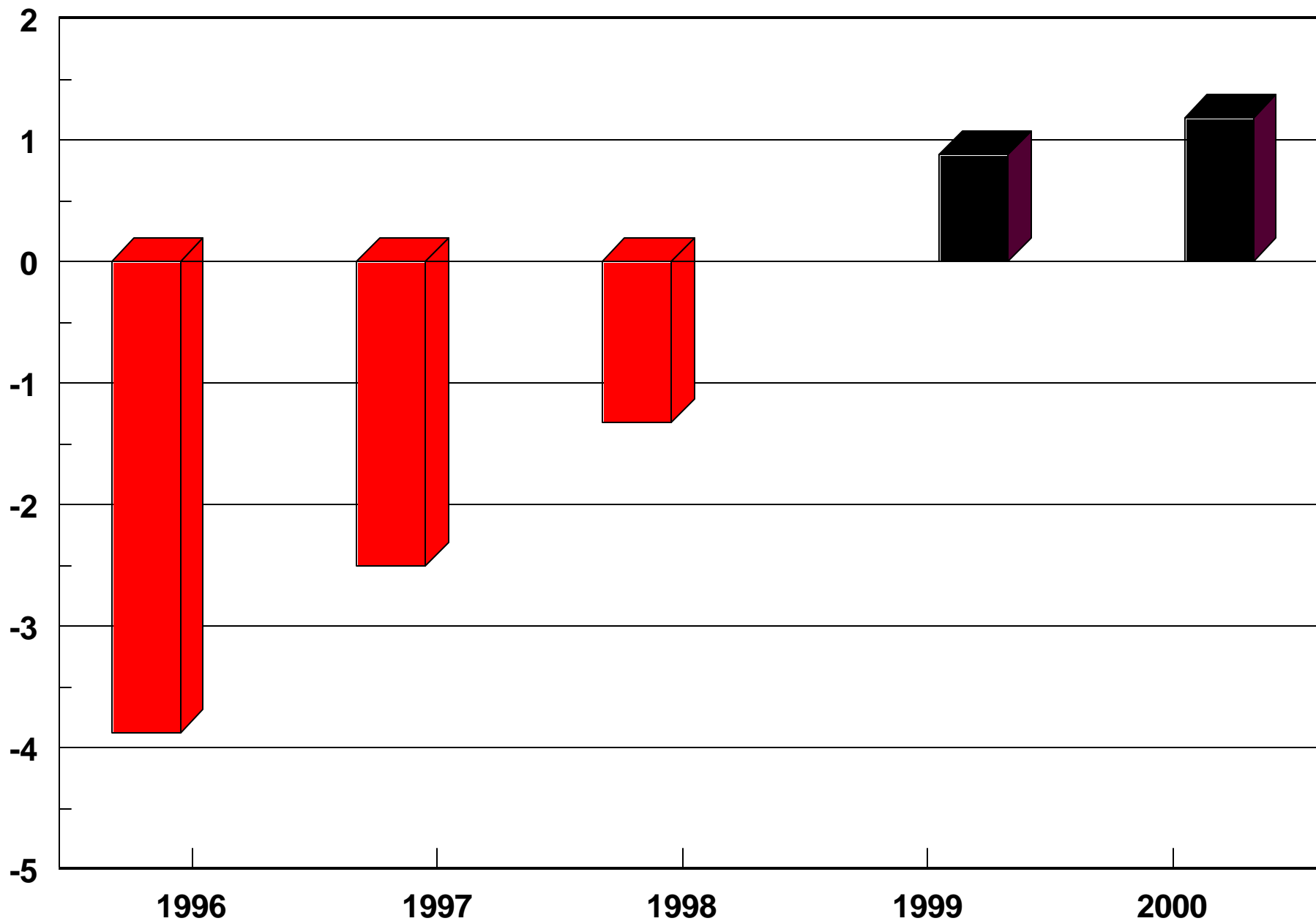
Billion \$



Source World Trade Atlas

EU Net Agricultural Trade With the United States

Billion U.S. \$

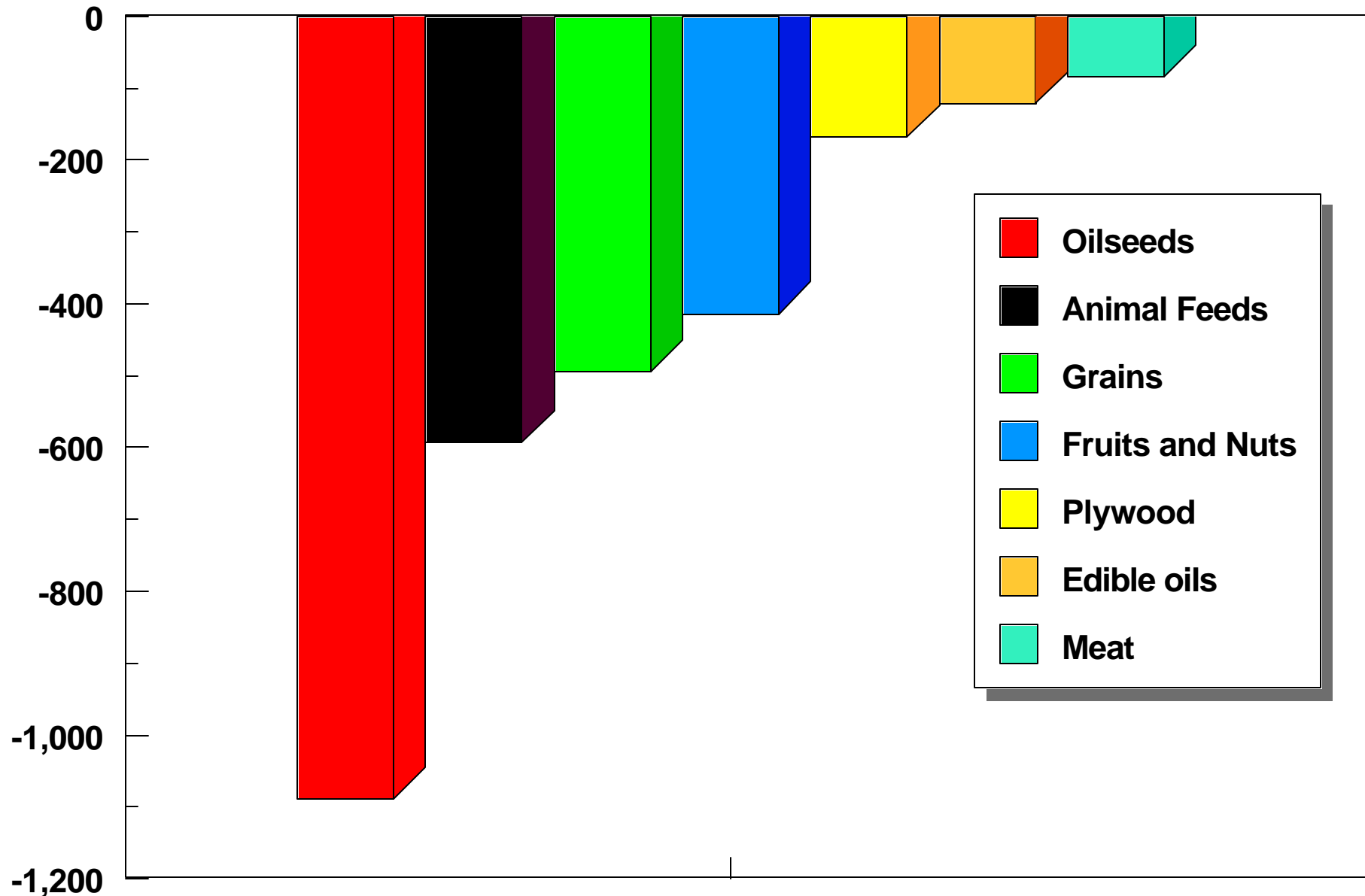


Source: Eurostat and the World Trade Atlas

EU Agricultural Imports from the United States

Change in Net Value of Imports from 1996 to 2000

Million U.S. \$

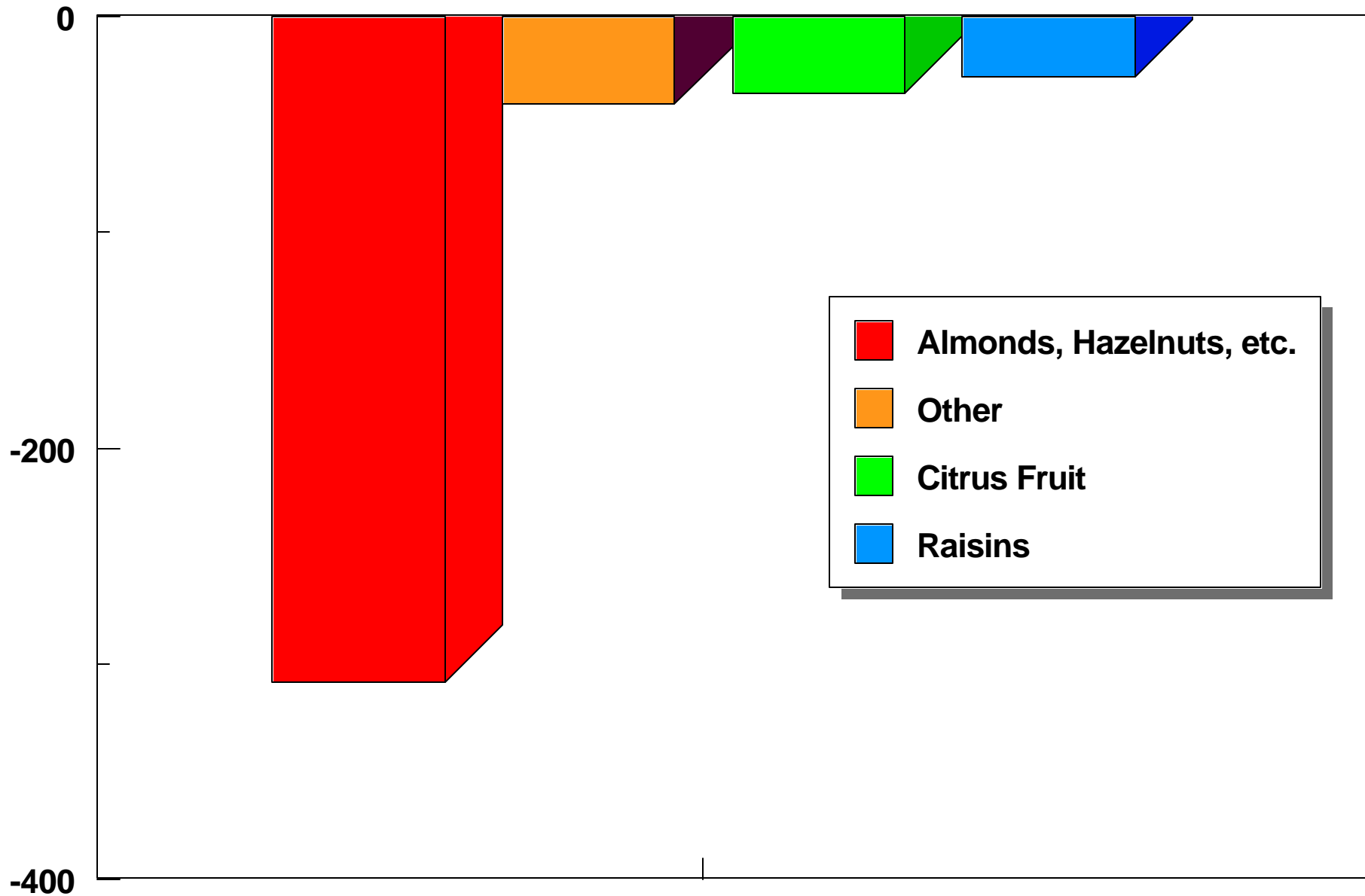


Source: World Trade Atlas

EU Agricultural Imports from the United States

Change in Value of Fruit and Nuts Imports from 1996 to 2000

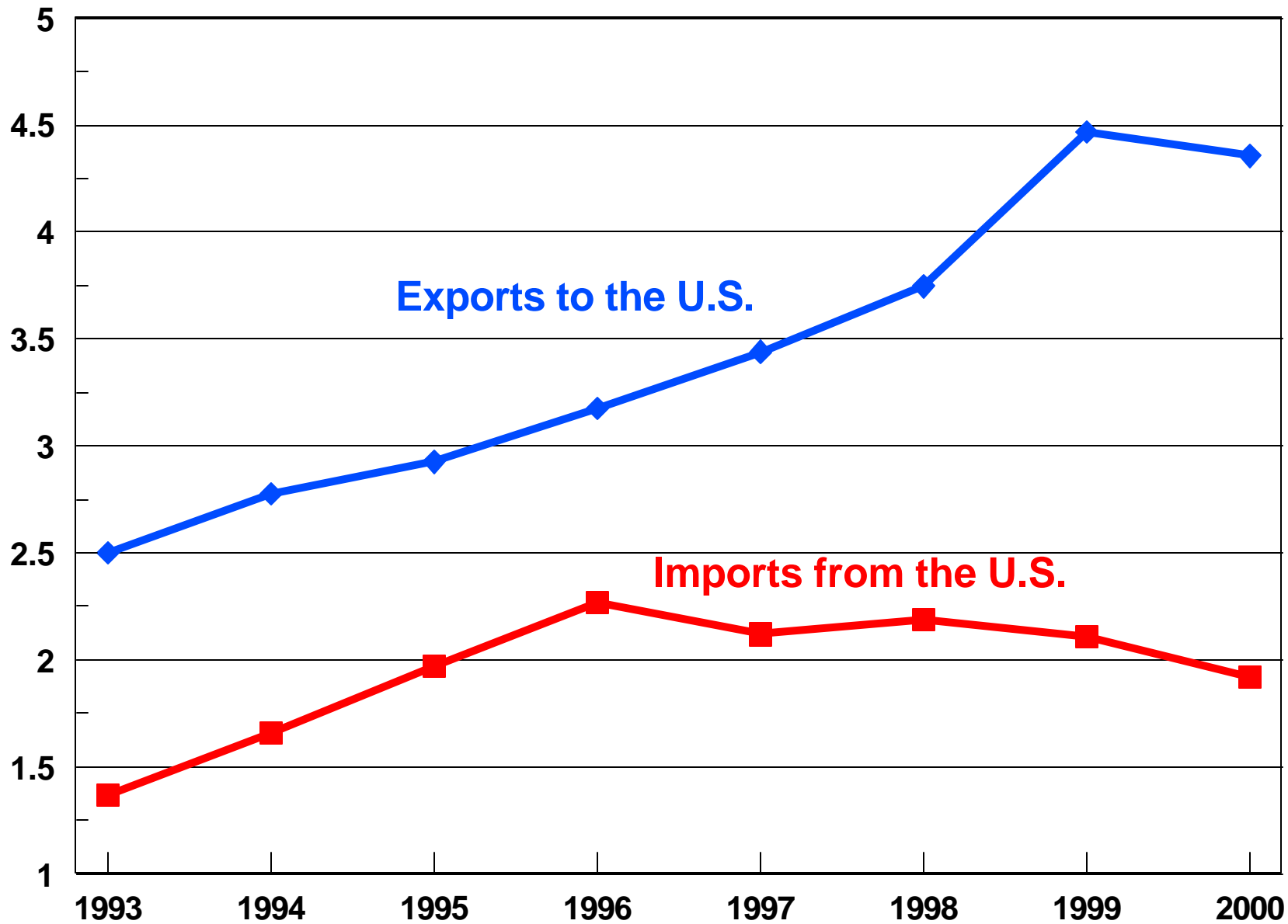
Million U.S. \$



Source: World Trade Atlas

EU Horticultural Trade with the United States

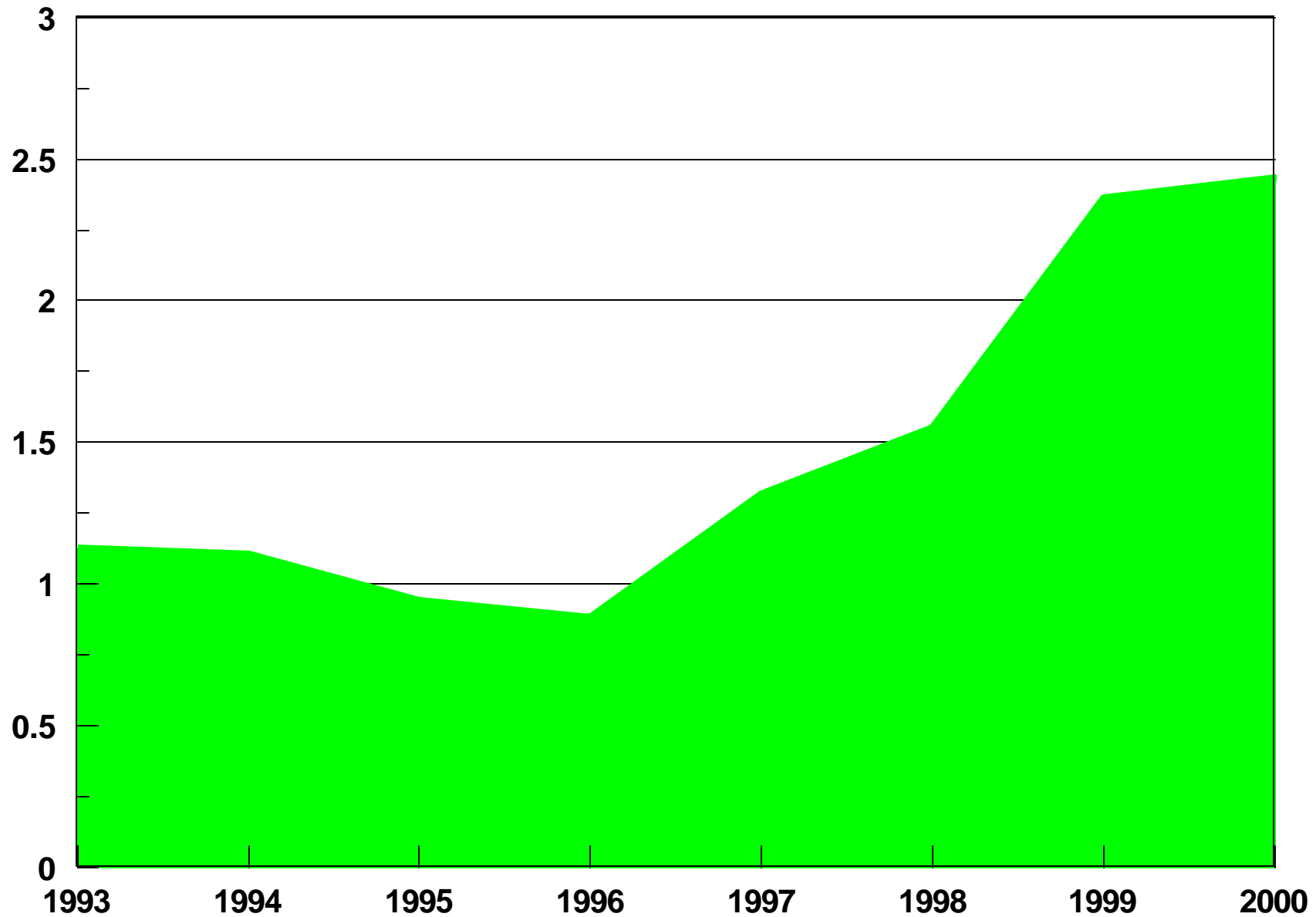
Billion \$



Source World Trade Atlas

Net EU Horticultural Trade with the United States

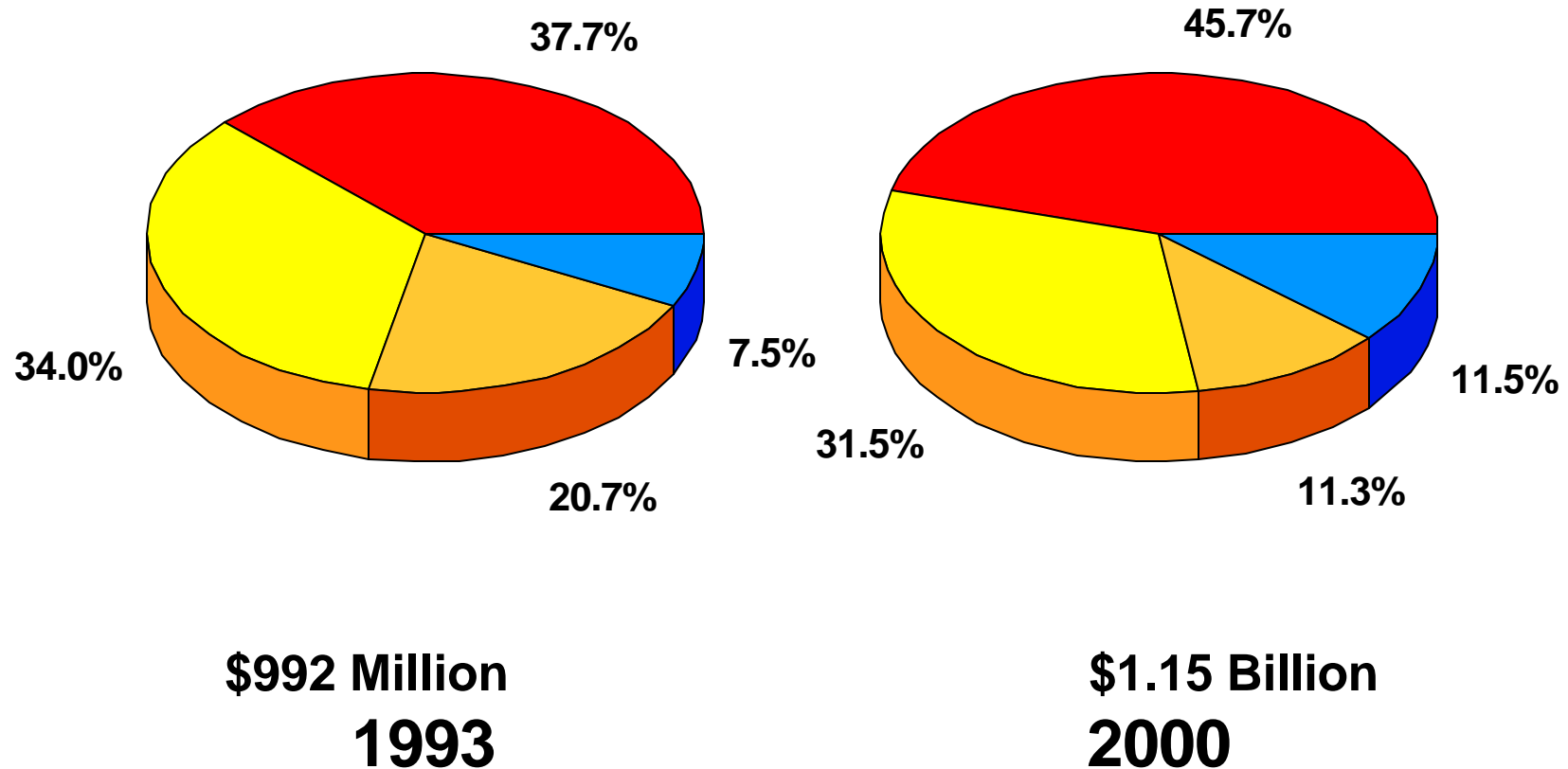
Billion \$



Source World Trade Atlas

EU Imports of Selected Tree nuts

Market Share of Leading Third Country Suppliers

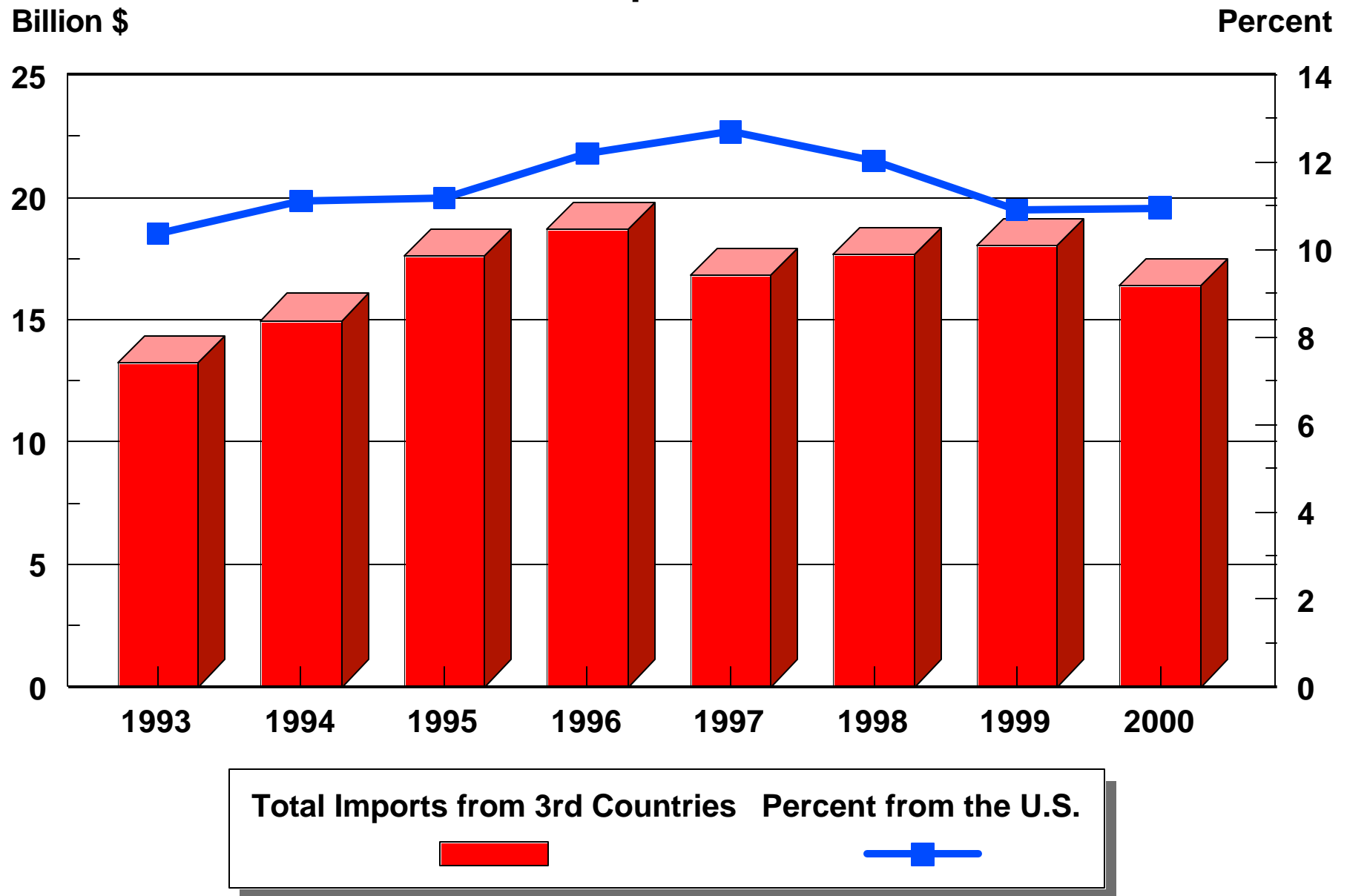


■ United States ■ Turkey ■ Iran ■ Other

Excludes, Peanuts, Coconuts, Brazil nuts and Cashews

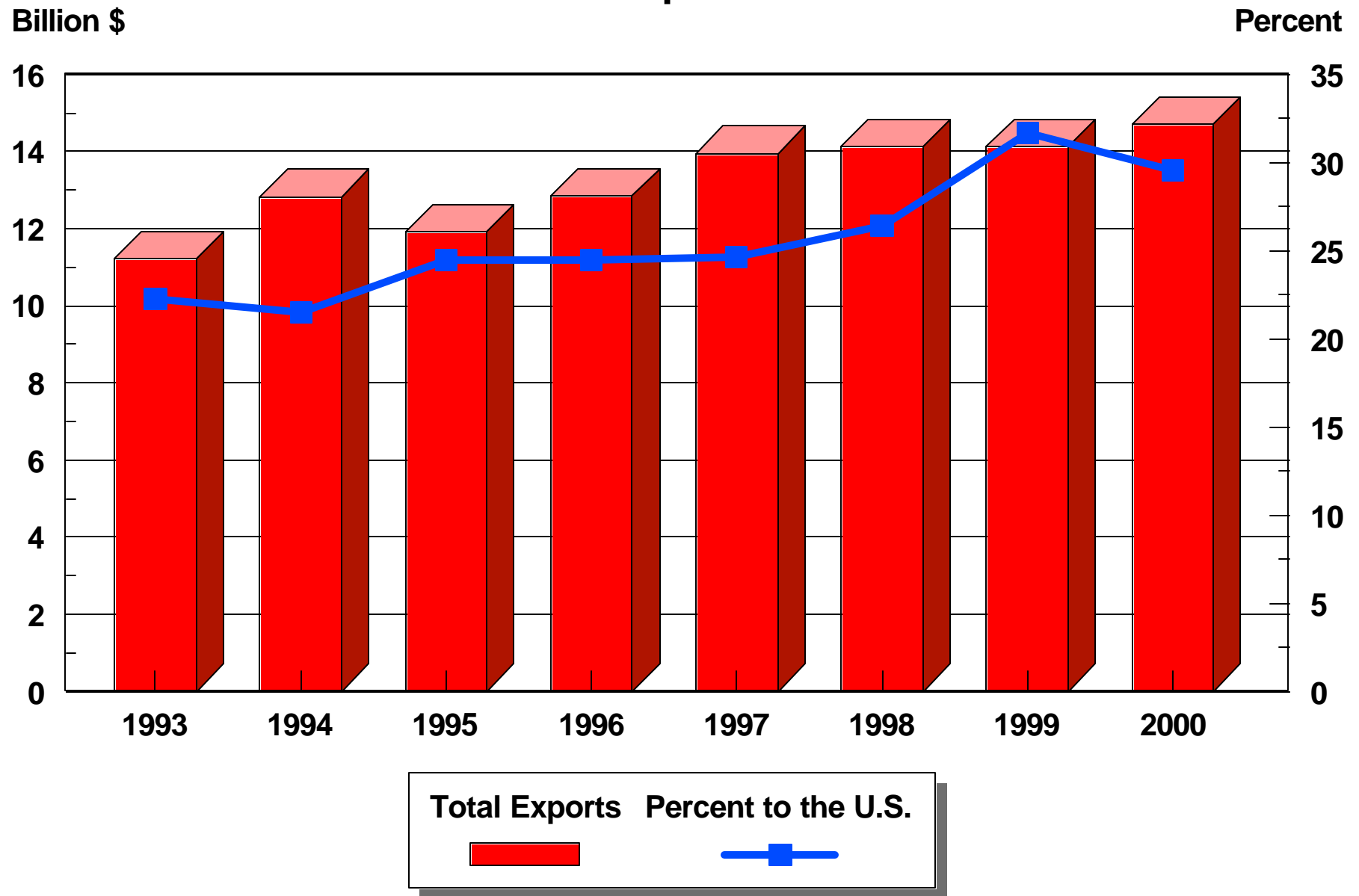
Source; Eurostat and World Trade Atlas

EU Imports from the U.S. as a Percent of Total Imports and EU Horticultural Imports from the United States



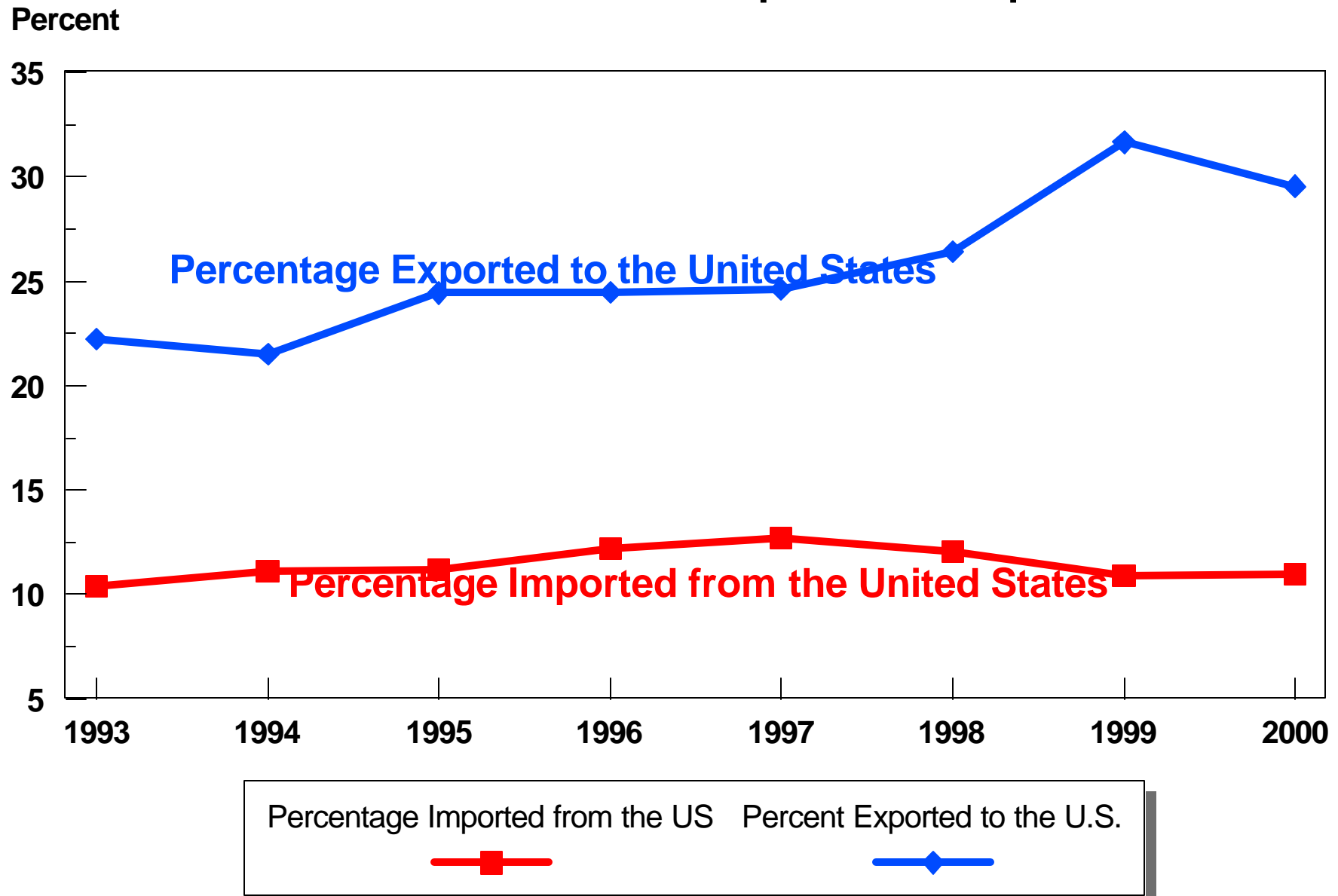
Source World Trade Atlas

EU Exports to the U.S. as a Percent of Total Exports and EU Horticultural Exports to the United States



Source: World Trade Atlas

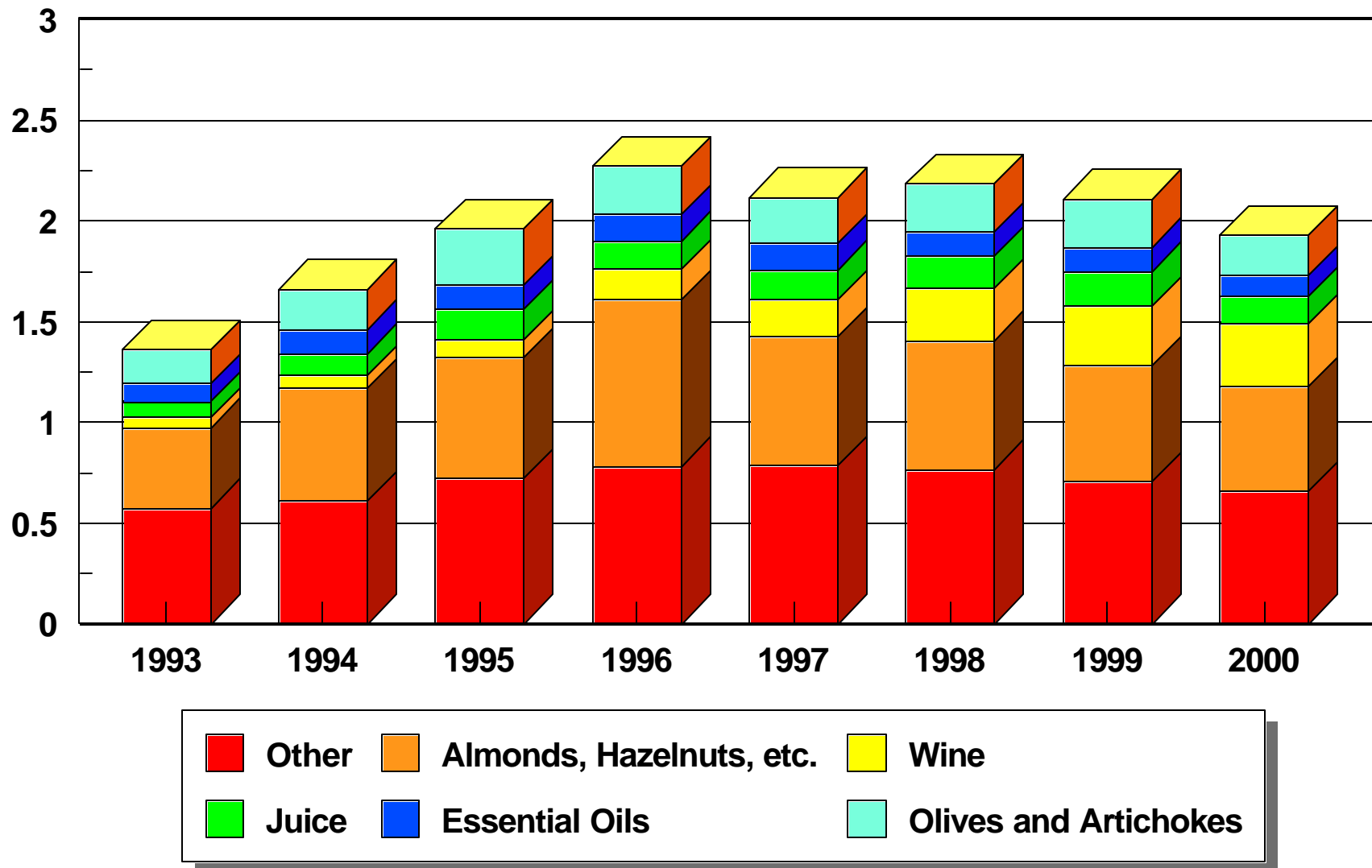
EU Horticultural Trade with the United States as a Percent of Total Exports and Imports



Source: World Trade Atlas

Top 5 Principal Horticultural Product Imports from the United States Account for Two Thirds of Total

Billion \$

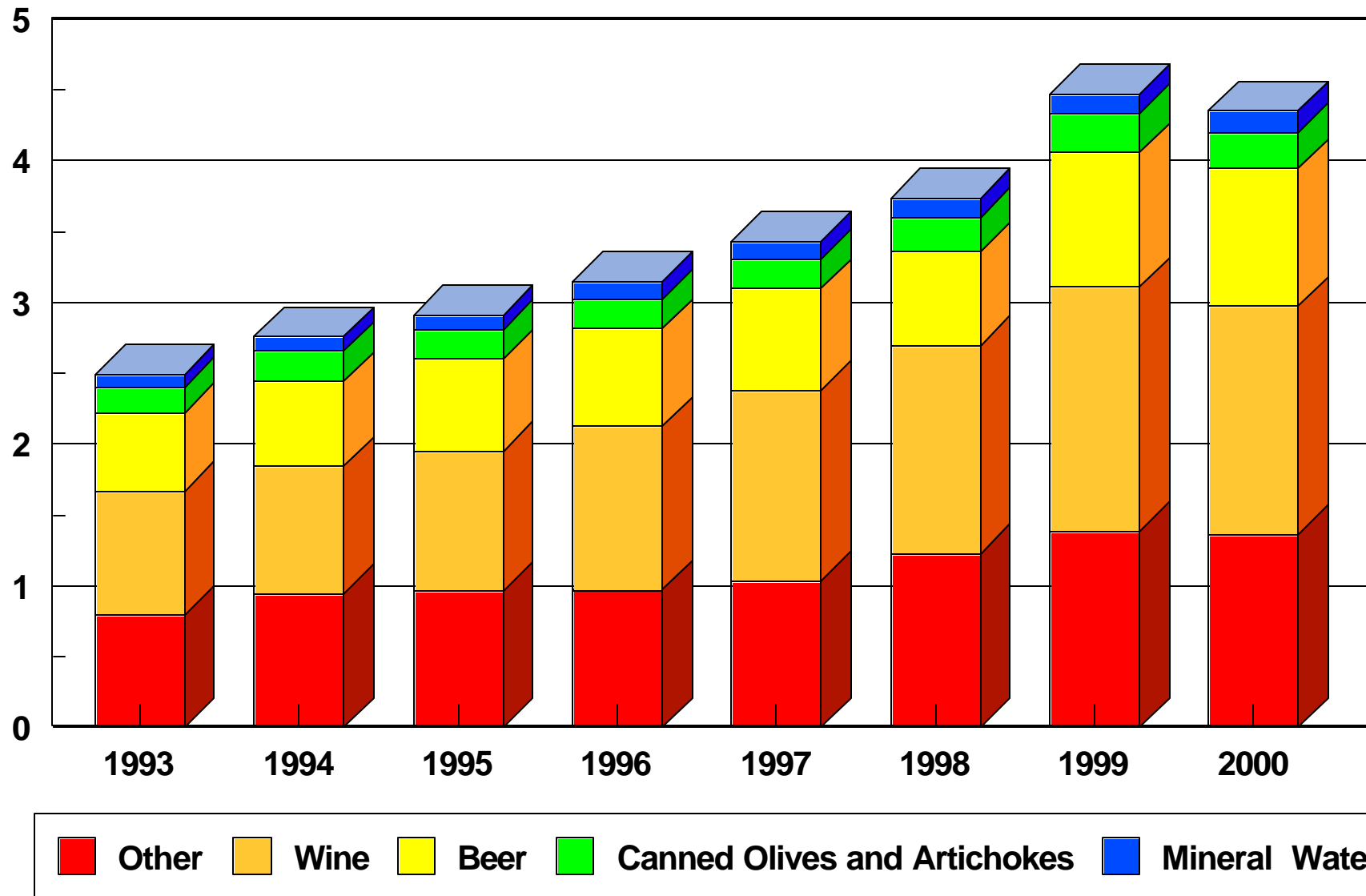


Source: World Trade Atlas

Tree nuts excludes, Peanuts, Coconuts, Brazil nuts and Cashews

Top 4 Principal Horticultural Product Exports to the United States Account for Nearly 70 Percent of Total

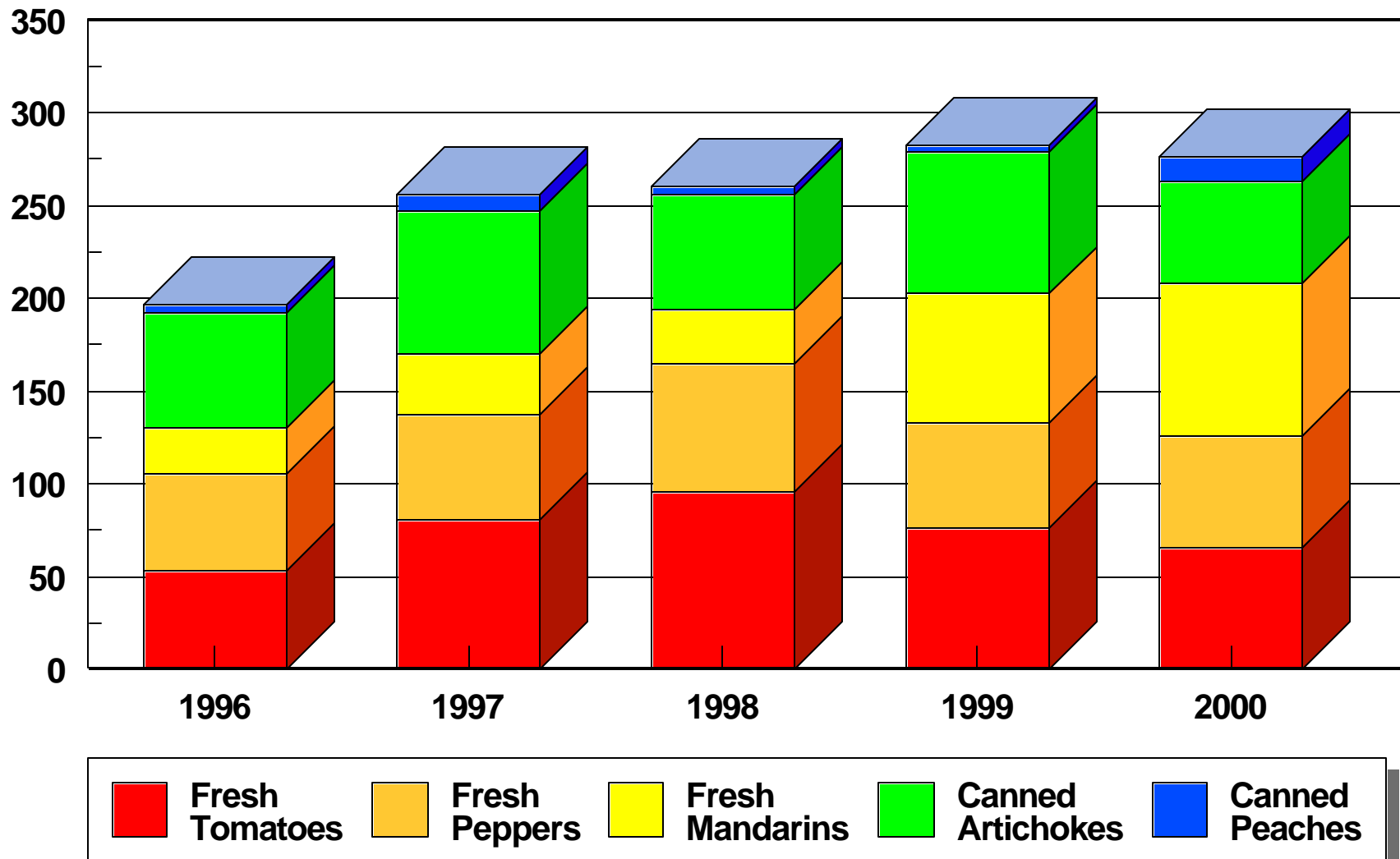
Billion \$



Source: World Trade Atlas

EU Exports to the United States of Selected Commodities Receiving Direct and Indirect Support from the EU Commission and Member States

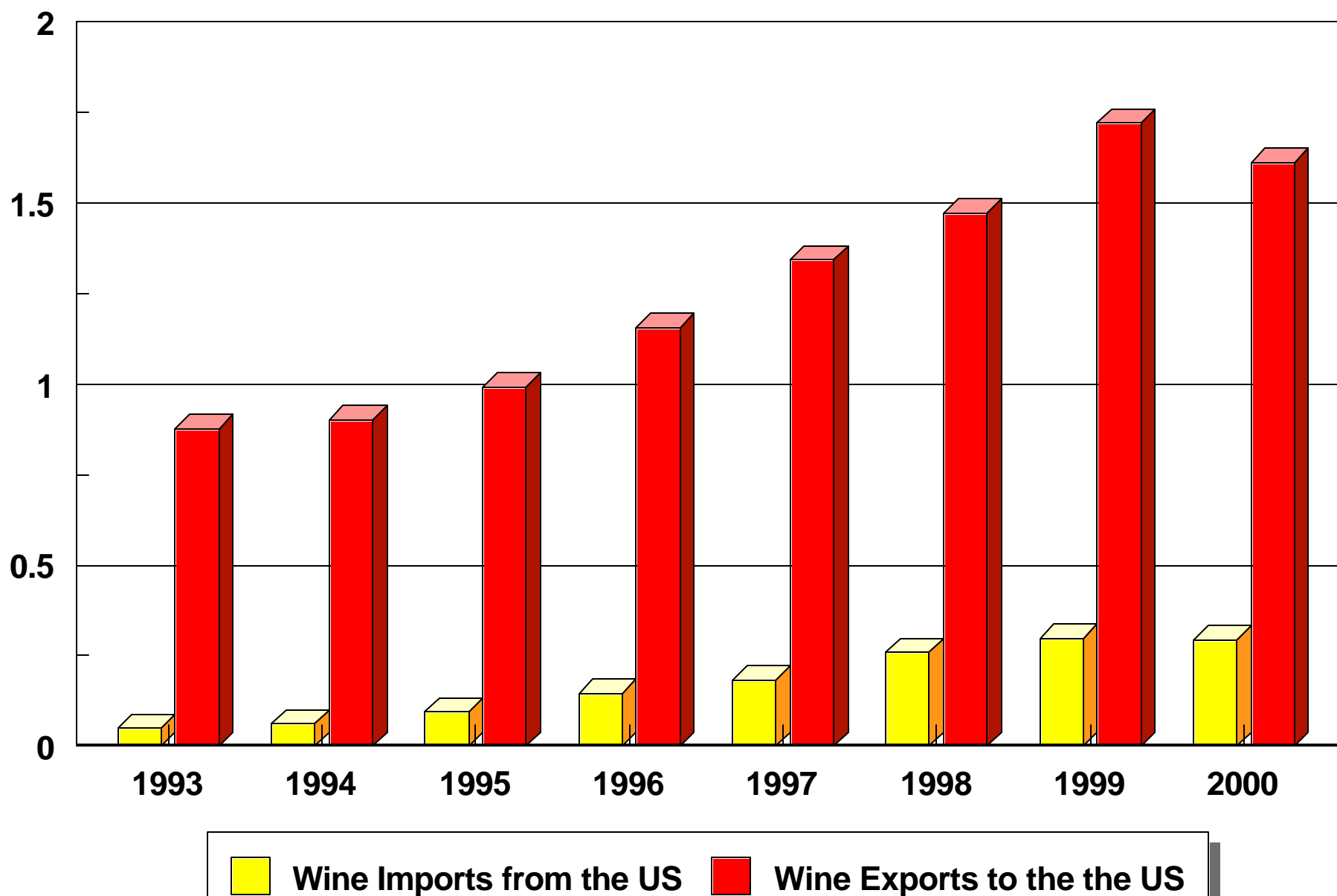
Million \$



Source: World Trade Atlas

EU Wine Trade with the United States

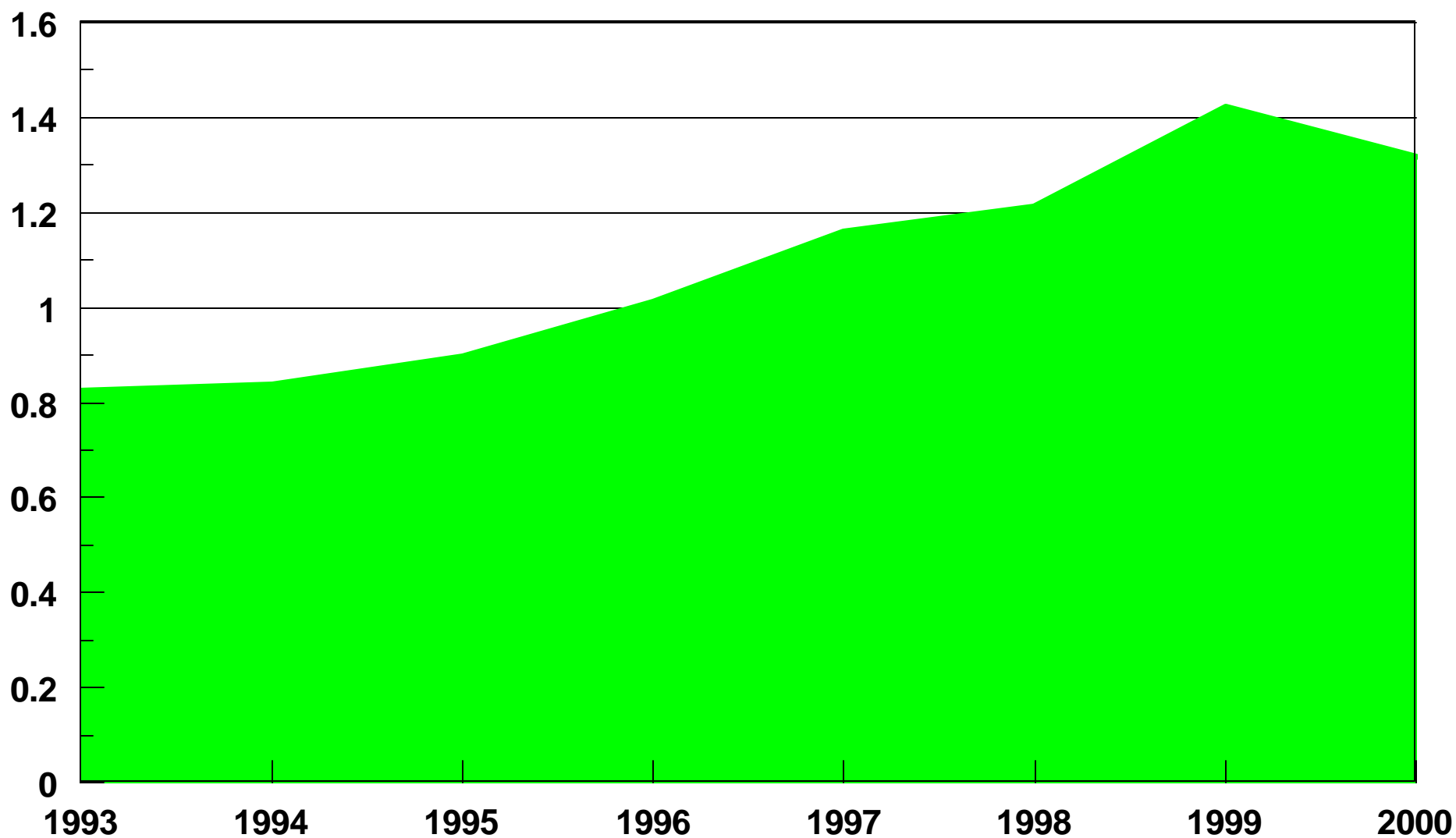
Billion U.S. \$



Source: Eurostat and the World Trade Atlas

Net EU Wine Trade with the United States

Billion U.S. \$

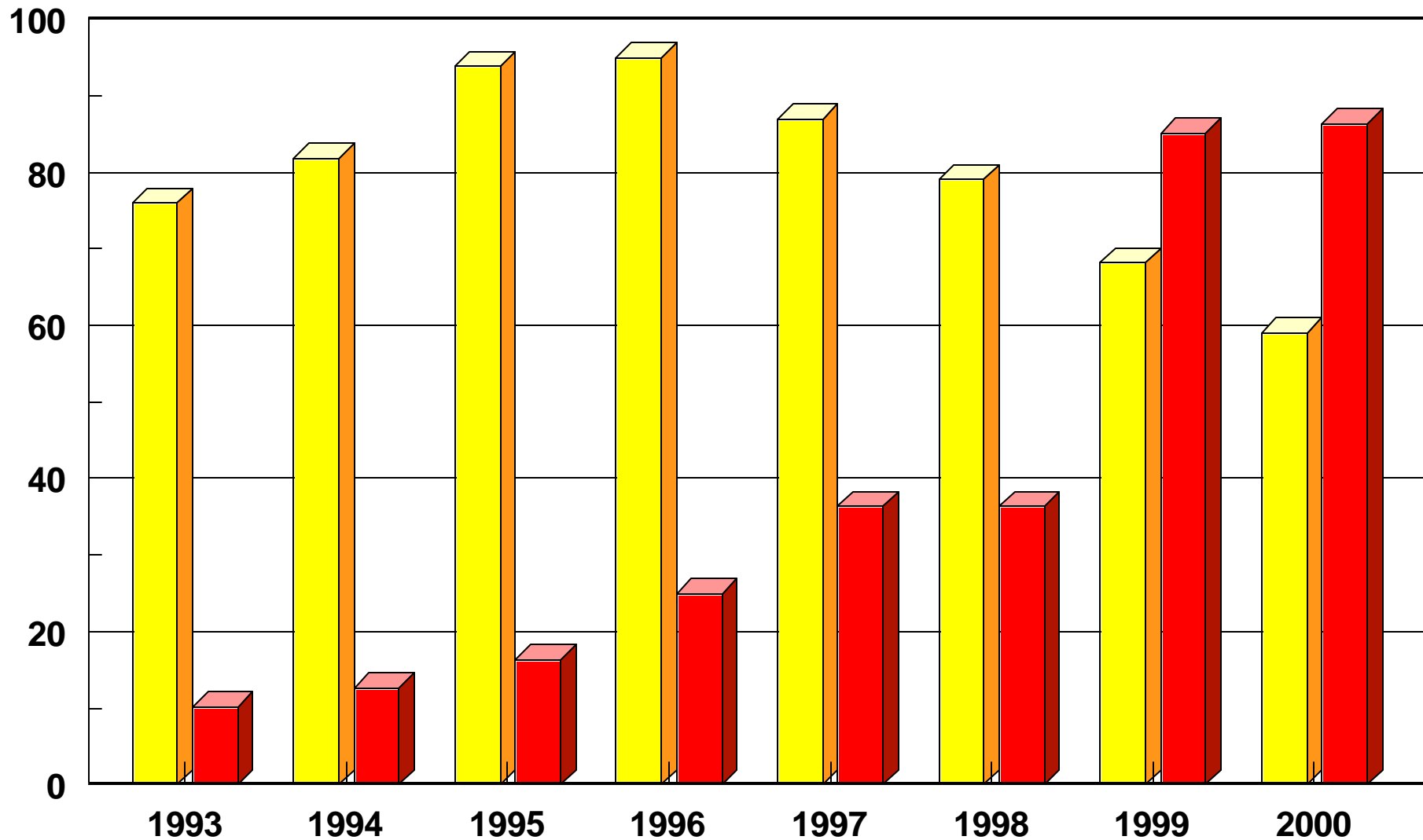


 Net wine trade

Source: Eurostat and the World Trade Atlas

EU Fresh Citrus Trade with the United States

Million U.S. \$

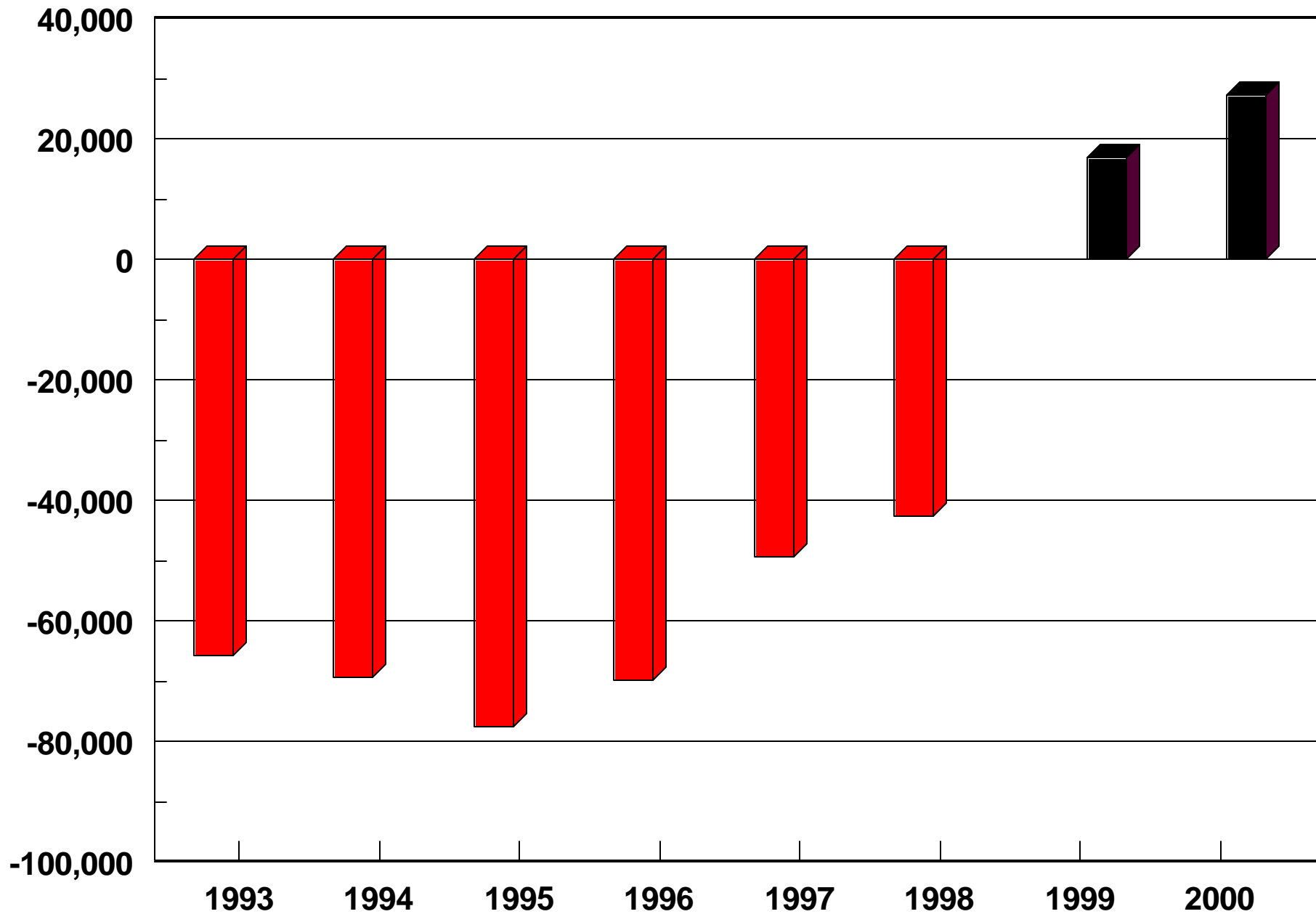


 Citrus Fruit Imports from the US  Citrus Fruit Export to the US

Source: Eurostat and the World Trade Atlas

EU Net Fresh Citrus Trade with the United States

Thousand U.S. \$



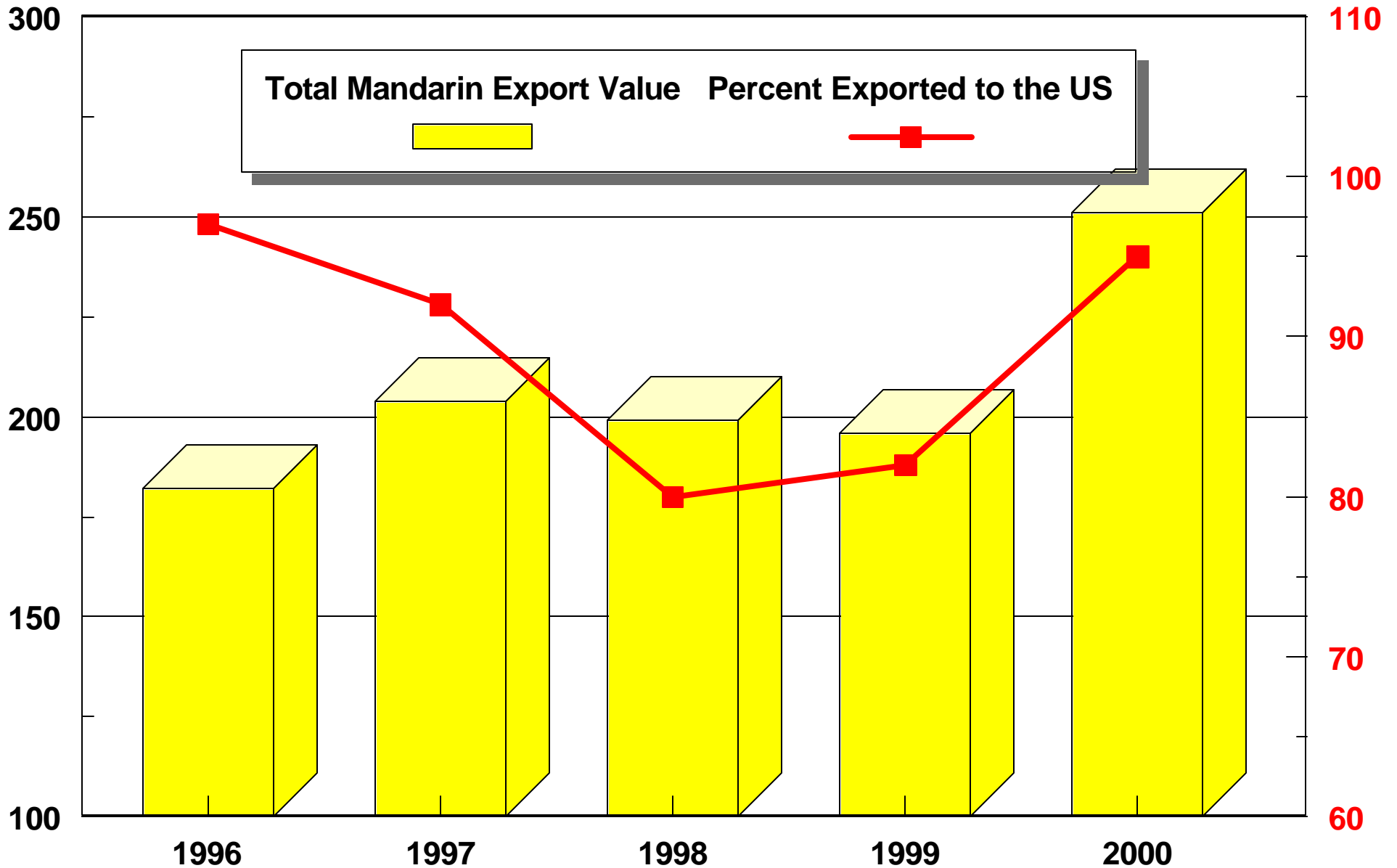
Source: Eurostat and the World Trade Atlas

Total EU Fresh Mandarin Exports to Third Countries

Percent Exported to the United States

Million U.S. \$

Percent



Source: Eurostat and the World Trade Atlas